

Staying close to your customers, even when you're apart

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In the same way that anyone resisting remote working in an organisation no longer has a leg to stand on, neither do the businesses who insist that their products, services or even processes can't translate to digital.

But what does this mean for the human part of the sales and customer experience equation?

Interestingly, the *pandemic world* accelerated another trend we started seeing emerge some time before Covid-19 hit, specifically in the financial services industry, but applicable in many more. Financial services firms were already starting to tap into the insight that humans, in the form of brokers, can provide into what is being sold, but also, what optimal customer engagements look like.

This insight helps provide optimised and personalised customer experiences across the entire sales organisation, whether in-person or remotely and ultimately helps boost the customer experience, satisfaction and retention.

These data insights and capabilities are at hand today for financial services firms to unlock and can point to digitalising anything from the structure of meetings, to how information is shared, to the products and services that are offered to specific customer sets. This requires tapping into the hive mind and crowdsourcing insights from across the entire organisation or fleet of brokers.

Rather than each person reinventing the wheel and doing their subjective best, organisations can accurately identify what works well across all customer encounters from real data and analytics. This data can then be used to build organisational processes and systems that replicate the best result.

This is the ultimate buddy system – team members can be nudged to mimic the actions and behaviours of their high-performing peers. This results in better engagements, improved customer experience, more sales and increased job satisfaction.

At Realm Digital we've done exactly this for one of our customers, a leading South African financial services provider, in a project to mobilise their field salesforce. To get this right, however, we needed to move beyond simply digitising the broker processes. We needed to really explore with our client whether there was a better way to do things.

How to do this:

1. Understand the problems you are trying to solve: Not only the business's problems but also your customers' problems. To do this you need to ask the right questions at the whiteboard stage and question all assumptions.
2. Don't assume that the problem your customer is describing is the actual problem. For instance: "*I hate having to fill in forms*" may actually mean "*This process is taking too long.*" This gives you the opportunity to fast track the entire process or break it into a series of smaller processes.
3. Recognise that human interaction is still central, even if it is via Zoom at the moment. The tech should truly augment the human with insights from the hive mind, rather than just doing badly what humans could do themselves (I'm looking at you, poorly implemented chatbots).
4. Get in the tech experts who can also speak business to unpack the business requirements and coach you through what is possible. A broader knowledge across competitors, industries, problems and solutions may be more valuable at this point than deep knowledge in a specific tech stack or industry.

5. Involve your people in the field from the get-go, they know what is required. And, a new way of working is more likely to get their buy-in if they have been involved in building it.

The outcome should be that you, and your field sales, are armed with both key metrics (what demographics, product, region, etc to focus on), and key processes (how to approach it). And this may be the opportunity to take your customer experience forward in leaps and bounds, rather than small steps.

Are you ready to tap into your organisational hive mind to radically improve your customer experience? With the current crisis, that may require you to *completely* rethink and re-evaluate what you deem as satisfactory customer service. Now is as good a time as any to start making the necessary changes that will take your organisation beyond the days of Covid-19.

If you are interested in any of the topics addressed in this article and would like to discuss, please [contact Realm Digital](#) to set up a virtual meeting.

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