

Using data analytics and CRM to drive customer centricity and win loyalty

 By [Jessica Tennant](#)

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Sanlam Reality, the Sanlam Group's loyalty programme, was awarded Best Use of Data Analytics/CRM Application at the inaugural Loyalty Awards South Africa recently held in Cape Town.

The Awards were initiated by local loyalty and CRM consultancy Truth to recognise loyalty excellence and innovation.



SA's best loyalty programmes for 2019

1 Nov 2019



Sanlam Reality won for their targeted CRM campaigns, offering world-class segmentation of its membership base, thanks to its longstanding partnership with brand experience agency Machine.

The agency drives its communication and content marketing strategy and has digitally transformed its marketing and communications function to harness big data for meaningful CRM.



Machine celebrates Sanlam Reality's win at inaugural Loyalty Awards South Africa

Machine_ 18 Nov 2019



I interviewed Sarah Browning-de Villiers, chief content officer for Machine/Narrative on the win and to find out how they use data analytics and CRM to drive customer centricity and win loyalty...

📊 **Congratulations on your win at the recent Loyalty Awards.**

Thank you – the win was really for the Sanlam Reality team, but we are proud to be a partner in their data analytics and CRM efforts.

📊 **As Francois Uys, Sanlam Reality's head of Marketing, Digital & Communications said of their Loyalty Awards win, "Loyal clients are the bloodline of profitable business and future business growth," the same is true of a powerful and successful client-agency relationship. What value is there in your seven-year client-agency relationship?**

At Machine, we're very lucky to have held the trust of Sanlam Reality for over seven years, which has allowed us to become entrenched in their business and understand their challenges and needs. For any client-agency relationship to be successful, you've got to understand one another, and seven-plus years together certainly makes that easier!

But to Francois' quote, loyal clients like Sanlam Reality are also the bloodline of an agency like Machine. True partnership means learning, growing and innovating together, and Francois and his team



Sarah Browning-de Villiers, chief content officer for Machine/Narrative

have consistently allowed us to do this with them. It is an enormous privilege and one we don't take lightly. It's why Machine is so proud of this phenomenal award, even though it was awarded to Sanlam Reality as an industry award in the loyalty space - that's what true partnership is: having every success or challenge feel 100% shared and mutual.



Sarah Browning-de Villiers on authentic, relevant content marketing that resonates

Jessica Tennant 18 Jun 2019



■ ***In your experience, how does the use of data analytics and CRM drive customer centricity and win loyalty?***

The bottom line is this: the more you understand me, the more you know how to really help me. The moment you start really helping me, I come to value you as a brand. That's exactly what we've been working on honing with Francois and his team: how to harness all of the data, insights and learnings.

We have to really know each and every Sanlam Reality loyalty member. But that's not enough – the magic happens when you take those learnings and put them to use.

Francois is a firm believer in the importance of content marketing – adding value to your customer's life over and beyond the product or service you're offering. As content marketing specialists, it's music to our ears!

“ *Being able to take data, understand the relevant insights and then apply it to the content marketing you deliver to your clients in a highly targeted and relevant way is the secret sauce so many brands are trying to find. Suddenly your CRM efforts go from spammy to sought after; ignored to anticipated. That's the brilliance of what Sanlam Reality is doing with its loyalty members.* ”

■ ***How does Machine/Sanlam Reality get this right?***

In addition to the points above, Machine offers a host of fantastic tools and data specialists to help drive the digital transformation required to press go on a smart, sophisticated and targeted CRM strategy. When you plug this into the specialist content marketers we have, you start to see incredible results.

Over and above this, however, Francois and his team's appetite for innovation and experimentation – and their trust in us – are really what makes this possible. It is a process of constant iteration and optimisation that requires agility and passion, not just from our side but from Francois' side, too.

■ ***The effectiveness of Sanlam Reality's use of data analytics and CRM to drive customer centricity within the Sanlam Group is a best practice model. What does it entail?***

It's a mixture of collecting and aggregating data to distil the relevant insights that will actually deliver ROI versus those that won't necessarily. A sophisticated CRM platform that plugs into this, and products and content marketing that are tailored to speak to those customer insights that we know matter. Everything from the product offering at Sanlam Reality to the kind of content we create for different types of members is carefully crafted to speak to the behaviours, interests and engagement we have from members.

It really is a perfect mix of a number of different facets coming together: product, technology and marketing. As a brand experience agency, Machine is well-positioned to enhance these areas with our various specialisations.

The impact of this integrated approach for the Sanlam Group has been significant – double-digit uplifts in customer retention, uptake of additional Sanlam products or premium increases, and new-business leads.

■ In layman's terms what does it mean to harness big data for meaningful CRM?

“ The thing with big data is that it's only as useful as you know how to use it. It's easy to fall down a rabbit hole of insights and analytics, and spend time and money chasing small shifts that have little to no measurable impact on a company's bottom line. ”

Harnessing big data for meaningful CRM takes an enormous amount of discipline and strategy in order to identify the insights that will really deliver ROI, and then how to use these across your various strategies.

What's crucial is to remain agile: the more you learn about your customers, the more you realise that you have to keep updating, changing and optimising to remain relevant.

At the end of the day, if you deliver value to your clients – whether in terms of product, service or content – you'll start to see the uplift. Get all of these areas right holistically, and the uplift becomes exponential.

■ Sanlam invests in high-quality, always-on financial content as part of its CRM strategy. How does the Sanlam Reality Loyalty Programme provide this and ensure that it's relevant, compelling and constantly optimised?

Everything we do with Sanlam Reality is constantly tracked, analysed and optimised, from headlines and keywords to the colours we're using on creative or the type of call-to-action we're using.

At Machine, we have a formidable network of editors, writers, content creators, influencers and experts who we tap into to ensure we're also creating the best, most interesting and most topical content we can.

We're also agile: we're quick to change course if something happens in current affairs that changes what our members are being compelled by.

And thanks to Sanlam Reality's award-winning data analytics, we are able to operate from insights rather than assumptions. We do a lot of AB testing, too, and both we and Francois are very open to testing our ideas and being real about what does and doesn't work. Francois' mantra is not to never fail, but to fail fast.



6 reasons why client-agency relationships fail

Sarah Browning-de Villiers 18 Nov 2019



■ What advice can you share with other agencies wanting to use data analytics/CRM to effectively drive customer centricity?

You've got to understand the way in which data analytics will deliver ROI to a client. Many of our clients are legacy businesses, and the implementation of sophisticated data and CRM systems will likely not only take significant financial investment, but it'll also take time, too. So be realistic with your clients and plot out a roadmap that delivers sprint-like successes for them in bursts, while also building towards a long-term capability that's right for them.

For more, go to Browning-de Villiers's [MyBiz profile](#), [personal website](#), and follow her on [LinkedIn](#) and [Instagram](#), and for more info on the Awards, visit [SouthAfricanLoyaltyAwards.com](#).

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