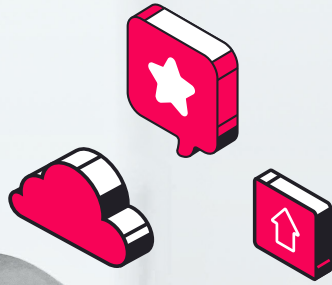


Alexforbes transitions to cloud era with contact centre migration.



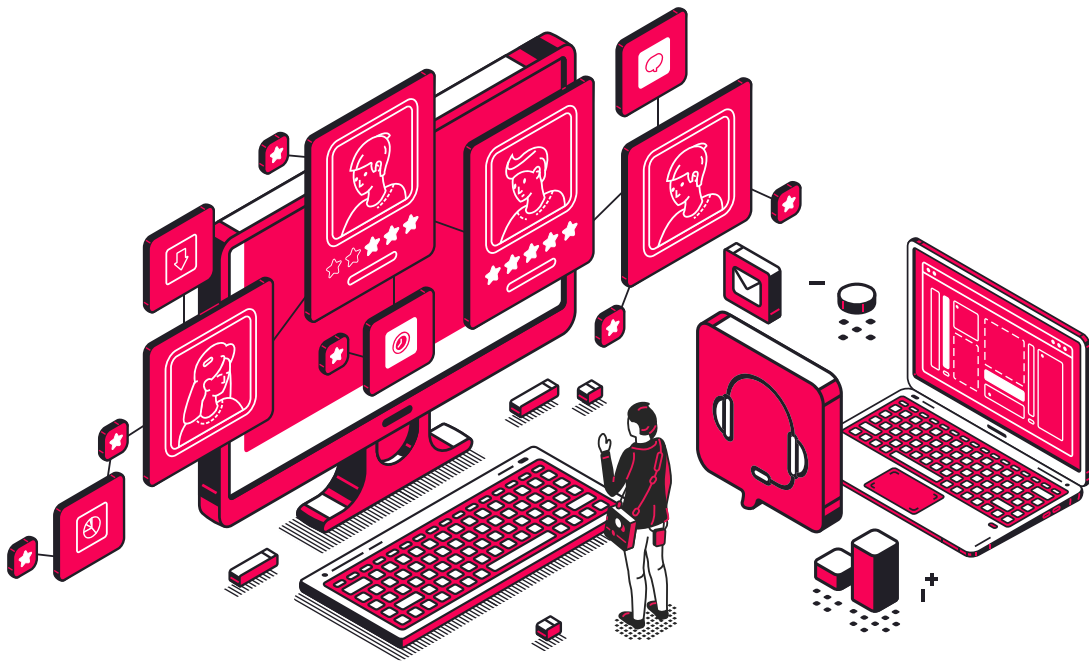
CONNECT[®]

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Overview.

Alexander Forbes (Alexforbes) is a leading financial services group that provides integrated retirement, investment, life, insurance, healthcare and employee benefit solutions to create, grow and protect client wealth and assets. Alexforbes South Africa is over 80 years old and has more than 1.3 million members under administration and over R450 billion in assets under management.

The Alexforbes Call Centre supports inbound calling to field client queries related to retirement and provident fund administration.



“Our call centre is another channel for our clients to engage with us, fulfilling a primarily services-based function where they can lodge requests, such as accessing their tax certificates, updating their personal details, or getting more information,” explains Etienne Naude, Chief Information Officer at Alexforbes.

The solution.

Alexforbes also needed to bring additional contact centre capacity online to handle an expected increase in call volumes when the two-pot retirement system comes into effect in September 2024.

"Taking into account the looming two-pot regulatory changes, having a cloud solution in place ensures we can quickly and easily ramp up horizontal and vertical scale for more computing capacity or additional licenses to meet the anticipated increase in call volumes."

Having developed a trusted relationship with Connect SA as a dependable managed services provider, Alexforbes chose to continue with the relationship.

"Connect SA understands our business and designed our on-premise solution, which offered important continuity benefits. It also made sense to remain on the same vendor as this created important synergies for our operation, especially as we approached the end of our on-premise licensing agreement," continues Naude.

Following an analysis of Alexforbes' requirements, Connect SA recommended Genesys Cloud as it offered a like-for-like swap between the on-premise and cloud platforms from a usability and agent experience perspective.

While the cloud-based Genesys solution offers more functionality and capabilities, the initial phase of the rollout maintained the status quo with regard to the features available to agents and management in the Alexforbes contact centre.

This functionality includes voice, email, workforce management, quality management, dashboards and real-time metrics, historical reporting, and call recording to meet contractual and regulatory compliance requirements.

"A cloud-based solution offers the agility and flexibility we need to support growth and integrate the necessary functionality and capabilities down the line," elaborates Naude. "As such, we felt it was an opportune time to start onboarding new contact centre capabilities before we needed them in response to changes in our business."

"The ability to maintain business continuity was vital to retain our ability to service our clients. This is a major reason behind our decision to implement a phased project cycle to migrate individual departments and our 500 agents, who operate from a centralised contact centre located in Sandton, Johannesburg," explains Naude.

"In this regard, speed of deployment was vital, which the cloud solution supports as all features and functionality are already there and ready. The security, governance and risk management features are all in place, which delivers the flexibility that makes it easy to embrace the solution."

Following an extensive year-long process to agree on a cloud migration roadmap, which included consultations to understand functional requirements and scope of work, and negotiations on budgets and timelines, Connect SA commenced with the implementation in Q2 2024.



Outcome.

With the first four weeks used to analyse, plan and design the solution architecture, Connect SA successfully spun up the first instance in May 2024.

"There was good engagement during the build and agent training phases and the initial rollout went well," affirms Naude.

Once full implementation for the initial phase is completed by October, the team will move to switching on higher-order digital functions and other leading-edge technologies to leverage these capabilities.

"We have plans to enable and switch on more functionality and unlock additional capabilities that were not previously available to us from our on-premise solution," continues Naude.

"We are looking forward to the ability to switch features on and off on demand, with updates and new releases implemented on a sprint basis in the background with no downtime."

Additional functionality that the Alexforbes contact centre plans to access in future includes an outbound dialler for the new business unit coming online soon, which was included in the migration project. New digital capabilities will form part of separate consultations beyond this project.

About us.

About Connect

Connect combines global contact centre and customer experience (CX) expertise, deep domain knowledge, and unparalleled industry skills to make the complex, simple.

Since 1990, we have leveraged our vendor-independent managed services approach to digitally transform how organisations communicate, both internally and externally.

We specialise in combining the most relevant technologies and services from leading vendors and platform providers to create opti-channel engagement solutions, orchestrating frictionless experiences and simplifying complex communication challenges.

Acclaimed partner

As an established and multi-award-winning Genesys Gold partner, we offer exceptional capabilities in extracting unparalleled value from data and AI, paving the way for deeply connected, personalised end-to-end customer and agent experiences.

Our collaborative ecosystem ensures seamless data sharing, advanced analytics, and workflow automation, ultimately positioning Connect as the preferred technology partner for organisations seeking to drive innovation and create truly frictionless customer journeys.

Connect stands out for our proven track record, implementing solutions that consistently earn industry accolades, showcasing our commitment to excellence and innovation.

With a footprint in key markets such as the United Kingdom, South Africa, USA and India, we bring global expertise to organisations seeking transformative solutions.

Connect with us.

To discuss a communications challenge or find out more about our capabilities, get in touch with us today.



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