

# Technology Survey – Member Insights Panel

## Dates run

17 – 31 August 2021

## Participation

654 respondents

## Objective

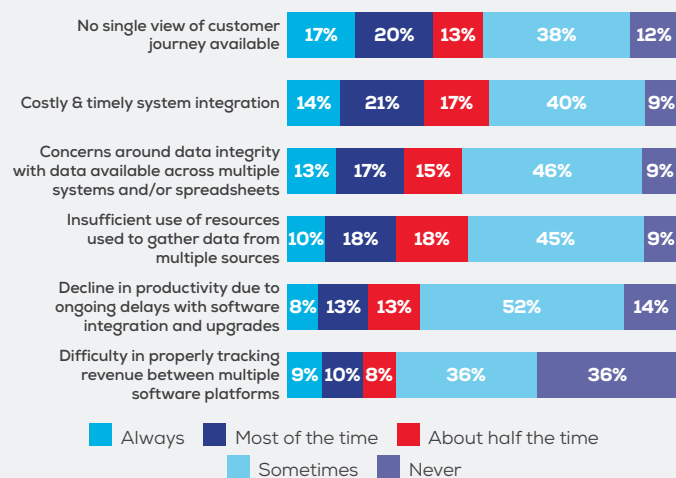
Understand the technology needs for members outside of Public Practice, and current usage of ERP, CRM and EPM softwares, and what members feel is missing. Understanding this will help us to work better with business partners and provide better tech solutions which are relevant to members.

## Key findings

### Members use a variety of software, but all come with their own challenges

Salesforce and SAP were the most used systems, with ERP being the most desired and convenient software. The majority of members stated they have challenges with their current software, specifically around not having one single view of the customer journey, and lack of integration.

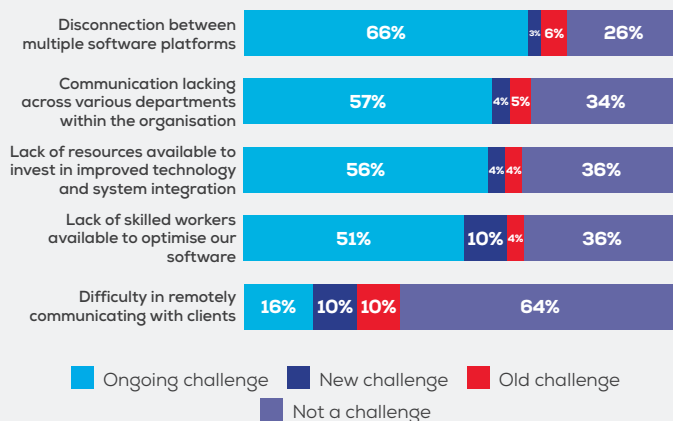
#### Software challenges



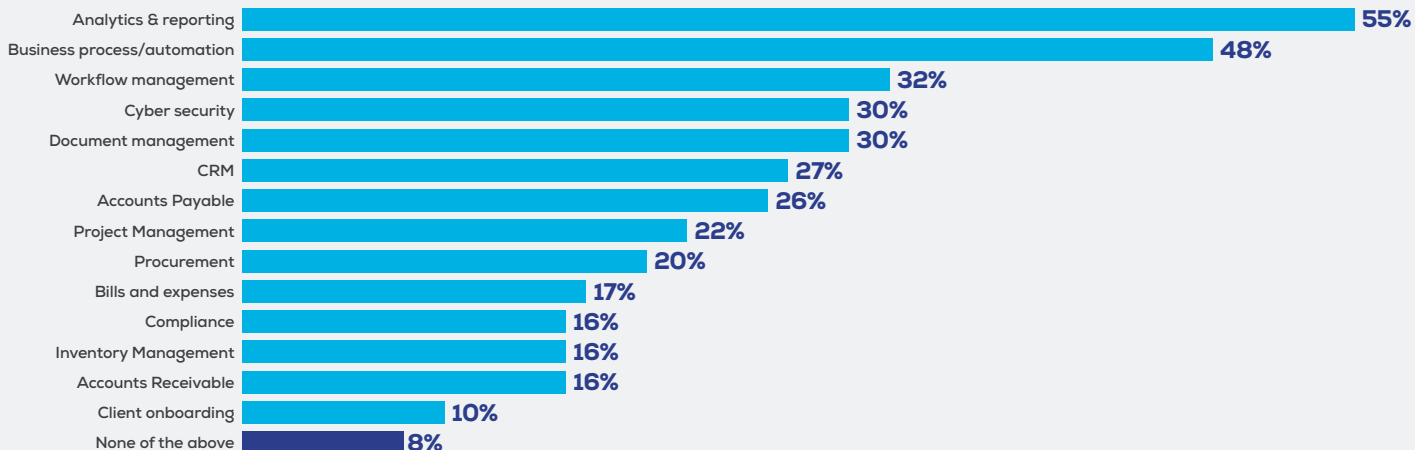
### COVID-19 has heightened some technology challenges

A third of of AU respondents are struggling with communicating with clients remotely, nearly doubling from prior to the pandemic. Members are also finding COVID-19 has reduced the number of skilled workers available to optimise software.

#### Software challenges affecting performance capabilities



#### Investment plans focus on analytics and creating seamless business processes



## Action points

### Offering solutions through technology partners

This survey has helped to identify critical technology issues that members are facing and where CA ANZ is best placed to support them. We are now working with our technology partners to develop solutions that will help members address their technology challenges.

