

## Case Study:

# Long standing UK mutual society builds strong customer relationships with clear, consistent, and timely communications

### Overview

For years, Wesleyan Assurance Society relied on manual processes and hard-coded letters for its customer-facing communications. The business lacked the agility it needed to revise documents quickly in response to customer, product or regulatory changes, making it difficult to keep messaging consistent and demonstrate its market leadership and expertise. To improve customer experiences and the quality and timeliness of communications, Wesleyan Assurance turned to Precisely to create a more flexible, template-based approach to document composition. As a result, the mutual society is building stronger customer relationships and realizing compliance benefits.

### Business challenge

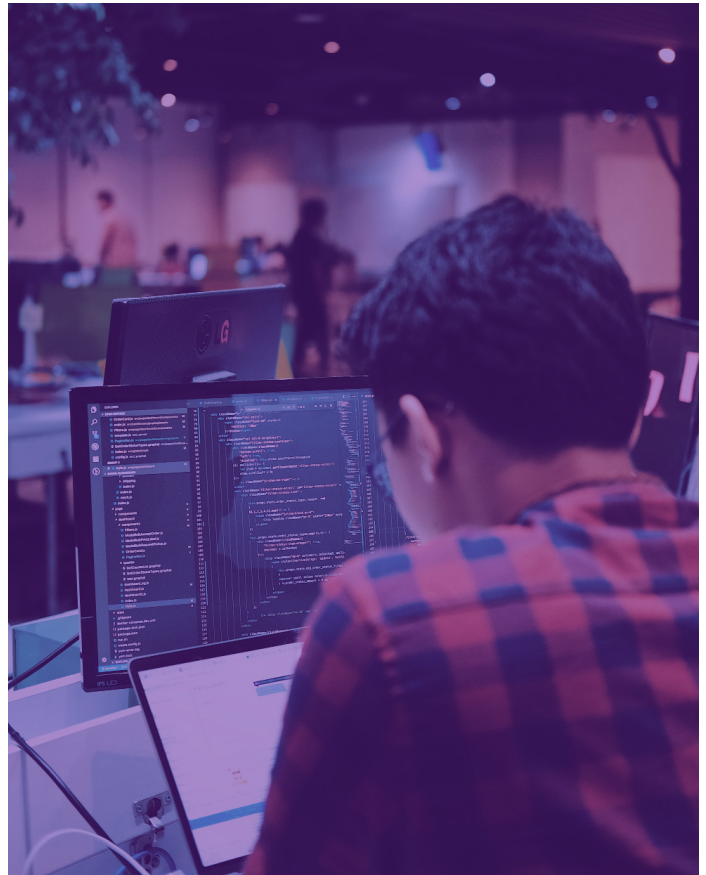
"The documentation and letters that we send to our members reflect who we are as a business," explains Keith Harris, Planning & MI Reporting Manager for Wesleyan Assurance Society. "We wanted them to be clear, timely, consistent, and high quality."

At the same time, the company needed to simplify the creation and maintenance of customer-facing documents. Each manual customer letter took up to 10 minutes to generate, with employees pulling information from multiple CRM and policy management systems. Once a letter was hard-coded, change requests could take as long as six months to complete. Wesleyan Assurance needed an easier, more consistent way to create and manage customer communications.

### Client profile

**Wesleyan Assurance Society**  
wesleyan.co.uk

- Founded in Birmingham, UK in 1841
- A mutual society with no shareholders
- Provides tailored financial advice plus a range of products to select professional groups
- Has 1,600 employees and more than 260,000 customers



## Solution

After a request for proposals (RFP) process, Wesleyan Assurance Society chose the EngageOne™ Compose document composition solution from Precisely to generate member communications from two new policy administration systems—one for its open book and another for its closed book.

Precisely worked with Wesleyan Assurance Society's business managers and document design team to create standardized and sound processes around EngageOne™ Compose, giving the business the ability to easily create and maintain documents. "Precisely demonstrated a great understanding of what we're trying to achieve as a customer-focused business," Harris reports. "We now have a robust solution for customer communications that's very easy to use."

Wesleyan Assurance Society now has approximately 300 templates set up in EngageOne™ software, enabling more than 1,200 letter variations that conform to slight differences in product messaging. After an employee makes a change in the policy system or a policy event occurs, customer letters are now automatically generated and printed via an overnight batch process. Business users can request alterations to templates and most of them take minutes to change when customer experience, product or regulatory changes occur, such as the recently enacted NHS payment reform in the UK. Wesleyan Assurance can now send timely and accurate communications at every touch point on the customer journey.

"With EngageOne™ software, we can adopt consistent tone and messaging as customers make changes and move between products, inspiring confidence and minimising confusion," says Brendan Folan, Head of Pensions & Protection for Wesleyan Assurance.

## Benefits

Now, when customers express interest in a new investment, submit an insurance claim, or apply for a policy, they receive clear communications that keep their experience streamlined and engaging. This helps Wesleyan Assurance create and sustain long-standing relationships with its customers. To create cross-sell opportunities, employees can easily enhance communications to inform customers of other products. Since implementing EngageOne™ software, the company's Customer Satisfaction scores are trending up, and employees spend much less time on document management. And when FCA audits occur, demonstrating compliance is much easier.

"EngageOne™ software gives us the ability to respond faster to customer needs and regulatory changes, helping us improve customer experiences, enhance compliance, and reduce risk," Harris adds.

Higher quality customer communications are also helping Wesleyan Assurance from a branding perspective, enabling the company to demonstrate that it understands its customers' professional and financial needs. In the future, Wesleyan Assurance will use EngageOne™ software e-Messaging to send email and text messages to customers and financial consultants.

"By automating our customer-facing communications with EngageOne™ software, we're giving our employees more time to focus on our customers and provide 10-out-of-10 customer service," says Folan. "Precisely is a great fit for our continuous improvement culture. Technology like this really supports where we want to be for our customers for many generations to come."

### Technology used

- EngageOne™ Compose

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— Keith Harris, Planning & MI Reporting Manager, Wesleyan Assurance Society