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How a fortune 100 financial services company transformed its basic servicing communications into improved customer experiences

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For one large U.S Fortune 100 Financial Services firm that provides investment and retirement services for millions of members, customer experience management was a top priority. However, the organization determined that many key communications for a retirement record-keeping service had become unmanageable, and was unable to facilitate the kind of positive user experience they wanted to deliver. This prompted them to seek the help of Messagepoint, who quickly became an important partner in helping the organization with its current and future goals of making its customer communications more efficient and effective.

CHALLENGE

Unmanageable communications

The company manages member communications for several large clients—each with their own requirements for branding, regulatory and messaging content. The existing legacy system in place prevented them from scaling beyond the 17 existing client deployments, which was a considerable concern. There were additional worries that changes to communications for new clients could lead to service issues to existing clients.

Putting business users back in control

The organization needed a solution that would empower its marketing department to directly execute changes and enhancements to communications, enable co-branding, and update designs to refresh the look and feel of its group retirement communications, ensuring they were visually appealing and easy to understand.

After evaluating several CMS and message management solutions, conducting an RFP and POC's, the firm selected Messagepoint and its cloud-based customer communications management (CCM) solution for its content management needs.

Benefits

+ **96% reduction** in the time required to make changes to customer communications

+ Any changes to communications now require little to no IT support

+ Targeting and personalization of customer communications is now possible

+ Key customer touchpoints now support co-branding

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Significant reduction in time required to make changes to client communications

Messagepoint gives the organization a hybrid-cloud based solution to meet its key requirements, and gives its business users an easy-to-use, collaborative platform for managing transactional communications—both print and digital—without help from IT.

Personalization and targeting rules can all be managed within the cloud without any need for code changes. The variation management abilities of Messagepoint also allow them to manage the numerous client versions of similar communications elegantly, making new customer onboarding a simple process.

With Messagepoint, on a single application, we saved six months of effort and $150K from our budget and we were able to get the job done within a week.

- VP of Marketing Operations, Fortune 100 Financial Services Firm

To learn how Messagepoint can transform your customer communications management, contact us today.

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