

Case Study

Quadient Inspire streamlines millions of client communications for NZ Investment Administration Services Business.

Sector

Investment Administration Services

Industry

Financial Services

Product

Quadient Inspire

Background

In 2021 Cumulo9 successfully deployed a full Quadient Inspire customer communication management (CCM) platform for a large and well-respected New Zealand based investment administration services business.

The business operates administration services for a wide variety of wealth management and Kiwi Saver businesses in the New Zealand market.

The new Inspire user creates reports for the customers of their clients, and there are millions of investors who receive these communications, which on an annual basis total several million documents. The documents can be complex in nature, and the recipients want clear and accurate communications, delivered via the channel of their choice.

The Challenges

Cumulo9's customer required a CCM platform that could generate documents at scale as there are very tight regulatory timeframes and large yearly peaks. They also needed a platform that was relatively easy to use and manage by support staff, rather than the traditional IT team.

The Administration business wanted to bring back control over the document creation of their reports and advices. They had relied on mailhouse service providers for that task. They were typically waiting in a queue for template changes and as a consequence there was a sense of frustration.



The Solution

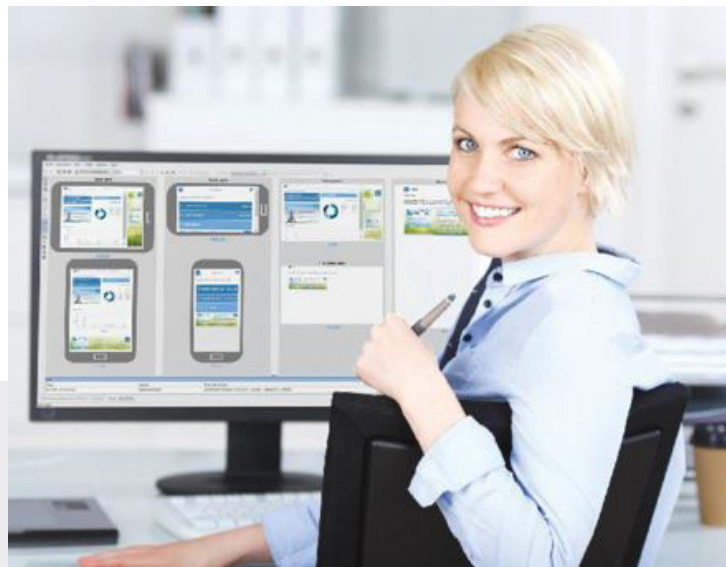
- Having an omni-channel platform capable of supporting all output channels has been a big win for Cumulo9's client. They have been able to move a significant volume of the communications away from the enveloped mail channel to PDF attached emails.
- The Quadient CCM offering was a better option than a Marketing Automation platform as it accommodated the complexity of various print streams and mail processing platforms and better connected to the archive system.
- The business also uses Cumulo9's C9 Transact service to send the emails out and reporting is fully integrated with a bounce back process to physical mail, which is fully automated and has end-to-end reporting which provides full reconciliation.
- A critical element of the initial evaluation was a requirement to easily accommodate the many different template styles and brands and then to be able to support regular changes in a highly efficient and accurate way. The Inspire platform with its powerful content library and version control system, was able to meet these requirements with "out of the box" functionality.
- Having a CCM platform that has thousands of global financial services client users means that Cumulo9's client benefits from the large "Inspire" R&D team who are moving at the speed of the market, with new releases including features like connecting to the WhatsApp channel and being able to generate output in an HTML5 format, which then accommodates inter-active document features.

The Results

- The deployment of the Quadient Inspire platform ran to plan with hosting via a third-party service provider. Three internal staff were trained to operate Inspire by Cumulo9. Cumulo9 also provide ongoing first line support for the platform.
- The fund administration business now includes a session on their reporting capabilities whenever they "pitch" for new business as it is the reporting that is the most visible element provided by the solution, and the communications themselves receive highly favorable comment from investor recipients.
- The Inspire based CCM platform is delivering a competitive advantage for Cumulo9's client.

Key Benefits

- Faster time to market; respond instantly to market demands without IT help.
- Business users control channel experience; one solution for correspondence and authoring.
- A fully secure end-to-end omni channel platform.
- Automated email default process to mail with full audit trail and reporting.
- Best practice customer comms that stand-out, providing competitive advantage for users of the platform.



If you would like to find out more about Quadient & C9 CCM Support, please feel free to contact us:

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