

## PremCom Makes Customers Feel Appreciated

UK service provider streamlines and automates referral and reward program for leading mortgage company.



PremCom boosted their client's campaign response rates by delivering a flawless service to their customers.

### AT A GLANCE

#### XMPie Customer

PremCom for Countrywide Mortgage Services  
[www.premcom.co.uk](http://www.premcom.co.uk)

#### The Challenge

To improve the customer experience for a referral customer acquisition program involving vouchers.

#### The Solution

XMPie Circle, an interactive digital storyboard for managing and automating cross media campaigns.

PersonalEffect TransMedia Pro for delivering cross media campaigns that span print, email and Web.

Open XM technology, for print and digital touchpoint personalization.

#### The Results

Increased efficiency, an increase in referrals, and a vastly improved customer experience, response times and other vital metrics.

### Background

PremCom is a leading multichannel print management organization based in Peterborough, UK. Their team of in-house experts provides full service client support to several high-profile brands and blue-chip companies.

Countrywide Mortgage Services is the UK's largest mortgage broker, employing over 600 mortgage advisors who offer a full range of mortgage and insurance products.



one to one in one™

A  Company

## Challenge

“Friends & Family” is a referral scheme run by Countrywide Mortgage Services to reward customers who refer their services to their friends and family. If another mortgage is secured, the customer receives a £50 store e-voucher which can be redeemed at their chosen UK retail store, as a reward.

The initial referral scheme was onerous and inefficient because every step was completed manually. Each referral had to be individually downloaded by an assistant, approved and sent to the Accounts Department. Vouchers were purchased manually upon order processing, rather than at voucher redemption, and upon final approval, the paper voucher was sent via postal mail.

Because of this convoluted process, customers could be waiting up to three months to receive their voucher and as a result, it proved difficult to scale up the scheme to

improve voucher redemptions. Additionally, there was no tracking feature once the voucher had been dispatched. Customers were complaining of not receiving them and it was time-consuming for the advisors to hunt down the missing vouchers. Countrywide was forced to allocate extra resources to handle issues and their mortgage advisors were losing faith in the rewards system.

PremCom was tasked with streamlining and automating the referral program to save their client time and money as well as to improve the customer journey.

“ With XMPie, we’re at the top of our game. We save our clients’ money and make the customer journey much easier and more intuitive. ”

Marco Poli, Managing Director at PremCom

## Solution

Using XMPie TransMedia Pro and Circle, PremCom upgraded Countrywide’s voucher redemption scheme to an e-voucher system credited at point of sale. The process was transformed from a lengthy manual process to a fully automated, omnichannel referral scheme managed from the Circle dashboard.

“ We designed and built this campaign for Countrywide using Circle, and it’s a fully automated process. The client also has access to the campaign and can collaborate and give feedback directly on how they feel the campaign is going. ”

Marco Poli, Managing Director at PremCom



The new process begins when a client purchases a property and begins mortgage payments to the lender whereupon s/he receives both a thank you email and a print piece in the mail. The data required for the campaign is stored in a database that both PremCom and Countrywide have access to. On a bi-weekly basis this data is searched through to find those that are eligible for the scheme. This data is then used to create both the print letter and email for sending.

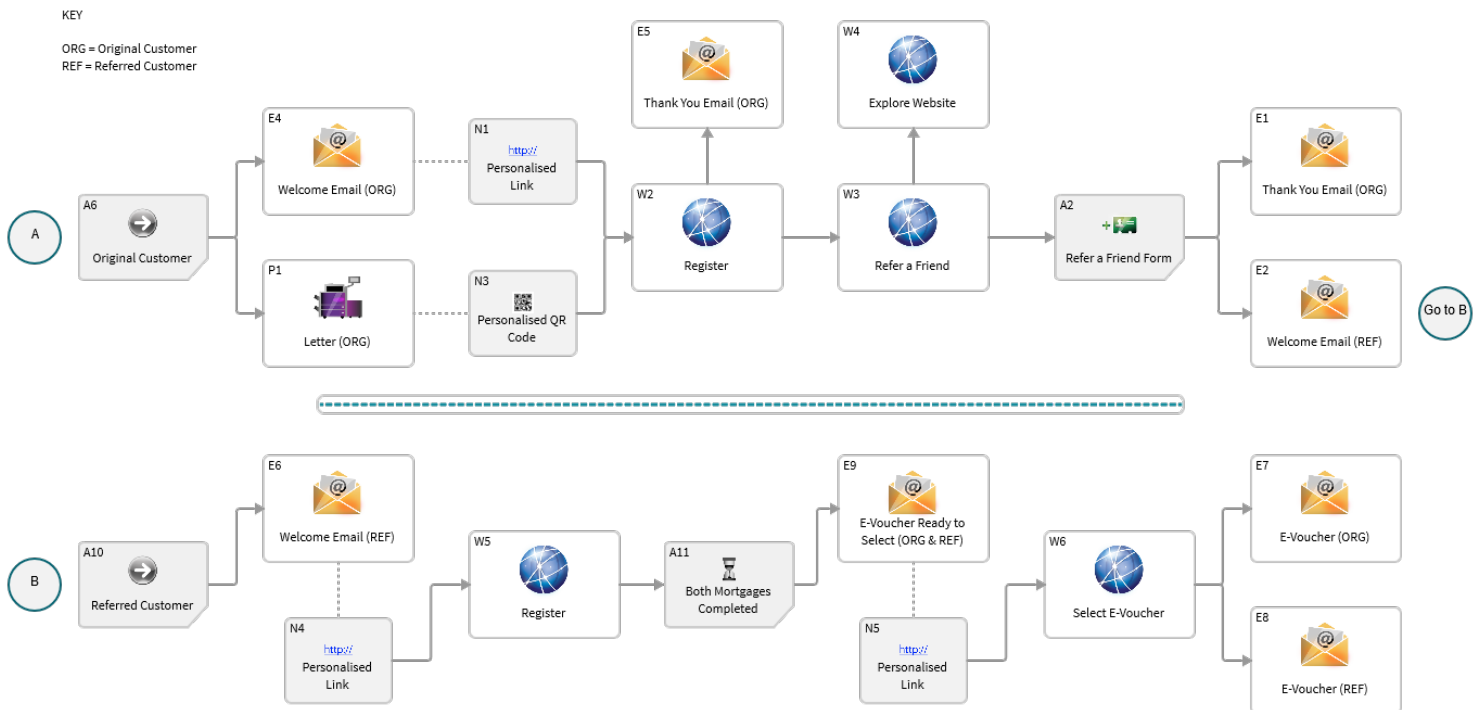
The print piece is produced automatically with a touchless workflow to the Xerox iGen150. The email and associated PURL are created using XMPie's Open XM technology. This meant that PremCom could be assured that all the personalized touch-points in the communications stream – both print and digital – would be synchronized perfectly.

Both the printed piece and email include an offer to benefit from Countrywide's 'Friends & Family' referral scheme along with a unique link to their personalized URL (PURL) where they can register for the program, update their details, make and manage their referrals and keep track of their e-voucher rewards.

Once their referral has been successful, they can choose from several e-voucher store options. PremCom uses Circle to send the data via a CSV File to their voucher supplier, via a built-in API link. Each morning the supplier collates all orders placed the day before and sends the requested e-voucher via a Countrywide-branded email designed by PremCom to each customer.

The ability to track emails allows the Friends & Family team to monitor those who have received and opened an email or clicked on the e-voucher. This allows them to know whether customer complaints, such as non-receipt of vouchers, are legitimate. In the few months since the new program's implementation in February 2017, Countrywide has already seen a vast improvement in efficiency and a high increase in referrals.

“With Circle automation, we're bringing prospects to our clients much more quickly than ever before.”  
 Marco Poli, Managing Director at PremCom



## RESULTS

- Referrals have increased. An uplift of 34% in new customers being referred to Countrywide was seen in February 2017 as compared to February 2016 and of 114% new customers referred in March 2017 compared to March 2016.
- Turnaround from submitting referral to receiving voucher decreased from three months to two weeks.
- The entire experience for the customer has improved.
- The Mortgage Consultants have more confidence in the new system. Since it was launched there has been a significant increase in the number of consultants actively using the scheme.



### Critical Success Factors

1. Leveraging Circle's storyboard feature allowed PremCom to map out the entire new omnichannel customer journey for their client within a matter of hours.
2. Automation across all the channels brought efficiency, leading to time and cost savings.
3. Having a progressive and technology-oriented customer looking to improve customer satisfaction, achieve cost savings and better management offered a window of opportunity for PremCom to show what they could do with automation.

### Lessons Learned

1. Solid technology works. There was no need to reinvent the wheel when a proven solution foundation such as XMPie already existed.
2. Periodically customers were not receiving the emails/ letters due to incorrect input from the sales force; this is now being rectified during training sessions.

“ People want to work with us because with the XMPie platform, we can offer extra services to their clients—not just print. ”

Marco Poli, Managing Director, PremCom