



**DELIGHTING MEMBERS & DRIVING VALUE:
BETTER CUSTOMER EXPERIENCE TO
STRENGTHEN RETENTION, ACQUISITION &
REPUTATION**

IN TODAY'S CONSUMER DRIVEN WORLD, FINANCIAL SERVICES CUSTOMERS EXPECT EXCELLENT EXPERIENCES WITH EVERY INTERACTION. BUILDING SOCIETIES KNOW THAT WITH COMPETITORS MAKING IT MORE ATTRACTIVE TO MEMBERS TO MOVE ACCOUNTS, ANY FRICTION A MEMBER EXPERIENCES WHEN UTILISING THEIR ACCOUNT ADDS ANOTHER REASON TO CAUSE THEM TO CONSIDER MOVING THEIR BUSINESS ELSEWHERE.

BUILDING SOCIETY OPERATIONAL PROCESSES AND REGULATORY COMPLIANCE REQUIREMENTS CAN PUT PRESSURE ON THE MEMBER RELATIONSHIP LIKE NEVER BEFORE. BUT CAN THESE SAME PROCESSES BE USED TO BUILD LOYALTY AND VALUE? SEFAS BELIEVES THAT DELIGHTING CUSTOMERS WITH EVERY INTERACTION IS A SURE WAY TO STRENGTHEN RELATIONSHIPS, SELL MORE SERVICES AND DRIVE PROFITS.

THIS WHITE PAPER OUTLINES HOW SEFAS SOLUTIONS UNIQUELY ADDRESS THE CHALLENGES FACING BUILDING SOCIETIES, SUPPORTING BOTH IMMEDIATE OPERATIONAL IMPROVEMENTS AND LONG-TERM STRATEGY FOR MEMBER CENTRIC, COMPLIANT COMMUNICATIONS.

SEFAS SUPPORTS BUILDING SOCIETIES BY ORCHESTRATING SECURE, COMPLIANT, ACCESSIBLE AND HIGHLY PERSONALISED CUSTOMER COMMUNICATIONS ACROSS ALL CHANNELS, HELPING THEM IMPROVE MEMBER EXPERIENCE, OPERATIONAL EFFICIENCY, AND REGULATORY ADHERENCE.



IMMEDIATE BENEFITS FOR BUILDING SOCIETIES

Building Societies face intense competition and rising member expectations for digital service, personalisation, and transparency. Sefas enables these institutions to simplify and automate member journeys, consolidate legacy systems, and eliminate friction in communications, ensuring every member receives timely, relevant information on their preferred channel.



OMNICHANNEL PERSONALISATION

Sefas lets Building Societies design, automate, and orchestrate customer journeys with true channel of choice delivery, so each member receives mortgage updates, savings statements, and onboarding messages via their preferred medium, such as email, SMS, mobile app, web portal or print. The platform tracks preferences and history to build trust, encourage retention, and simplify acquisition workflows, with powerful two way communication capability for feedback, account actions, or compliance confirmations.

OPERATIONAL EFFICIENCY AND INTEGRATION

The hybrid architecture of Sefas solutions merge document workflow management, rules engines, and a secure data repository to automate content generation, reconfigure print and digital routing, and maintain auditable records. Integration with scanning, web forms, mobile apps, and legacy line of business systems reduces manual handling and data silos, driving operational efficiency without disruptive migrations.

COMPLIANCE AND SECURE PROCESSING

Regulatory pressures and cyber risk demand robust tracking and secure document delivery. Secure distribution, retention, and access management for sensitive materials such as mortgage documents and regulatory disclosures ensure full audit trails, multi-factor authentication, and rapid response to compliance requests.



USE CASE EXAMPLES

Automated onboarding: New member selects communication preferences; Sefas delivers compliant welcome documents, account access info, and records consent digitally or by print as appropriate.

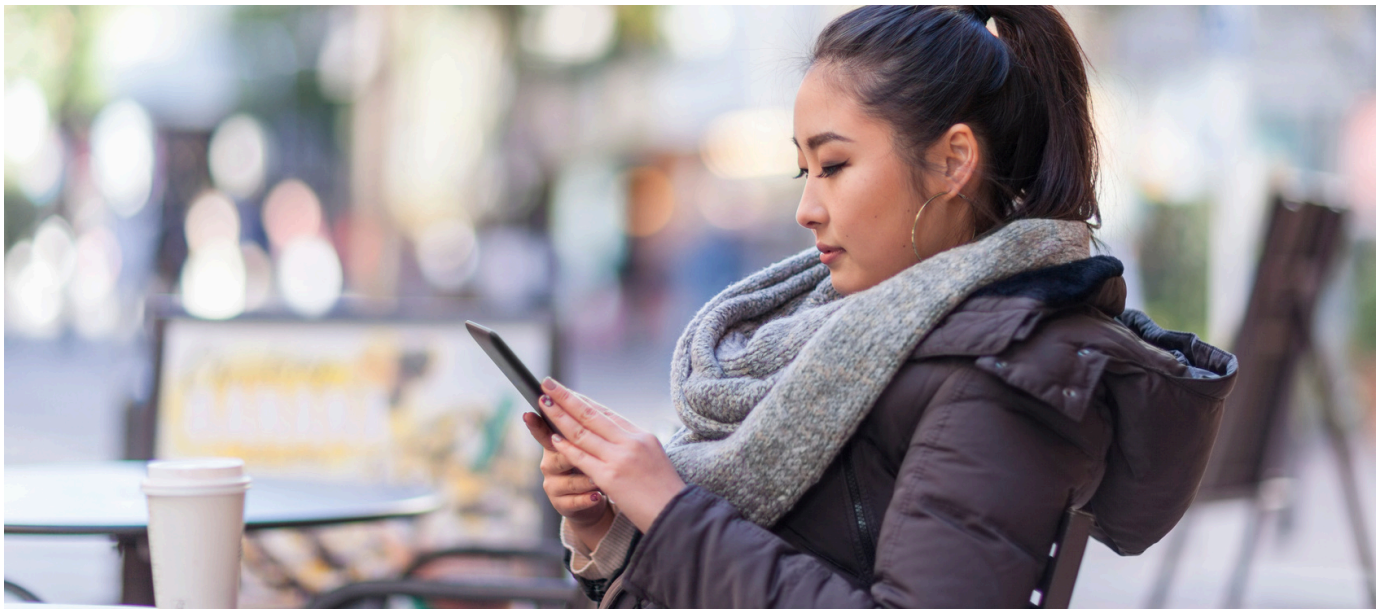
Contract renewal and consent: Trigger renewal notices, handle digital signing, archive signed contracts, and confirm compliance, all tracked and accessible in real time.

Multi-step customer journeys: If an email goes unopened, send a follow-up SMS and if needed escalate to secure physical delivery, ensuring critical communications reach each member as needed.

STRATEGIC ADVANTAGE

Sefas empowers Building Societies to differentiate with seamless member experiences, unified compliance management, and efficient digital transformation, strengthening retention, acquisition, and reputation even in a rapidly evolving market.

Contact us to see how our solutions uniquely address the challenges facing Building Societies, supporting both immediate operational improvements and long-term strategy for member-centric, compliant communications.



ABOUT SEFAS

Sefas is a global leader in omni-channel customer communications management solutions. Its technology provides end-to-end solutions to manage the creation, efficient production, secure storage, and distribution of omnichannel customer communications.

Sefas is a business unit within the Docaposte headquartered in Paris, France, and home to its research, development, and quality assurance operations. Sefas global offices are located in France, USA, and UK with clients worldwide leveraging composition, multi-user digital collaboration, advanced workflow automation, orchestration and digital distribution services. Sefas's clients include Strategic Communication Outsourcers, insurance, finance, healthcare, government, and telecommunications companies.

Visit us at www.sefas.com to learn more.