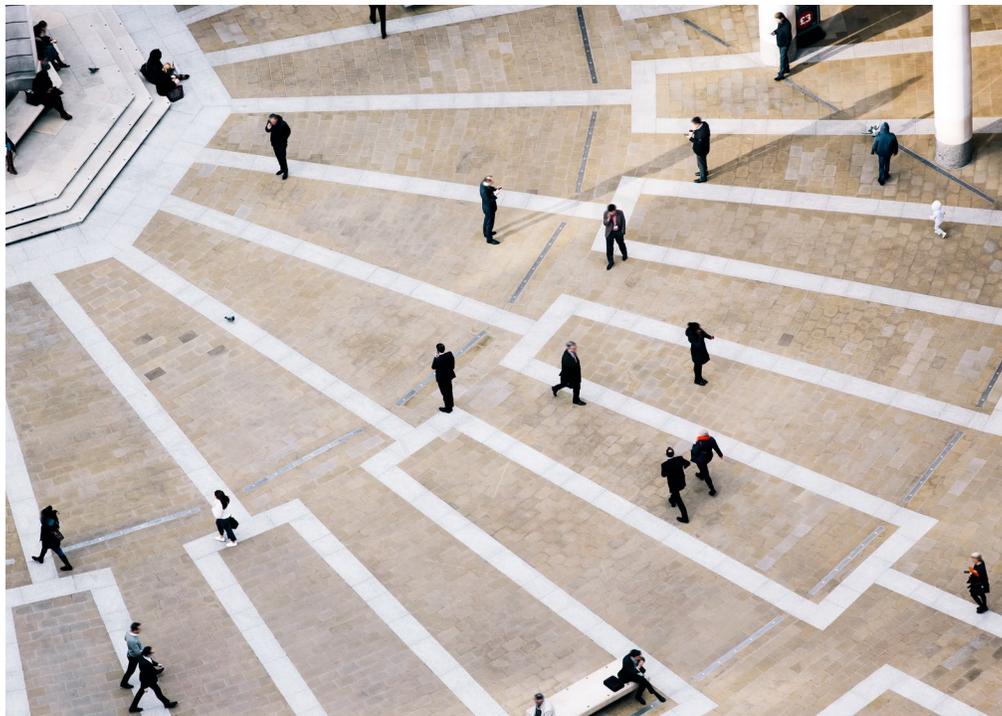


# Broadridge Consulting Services

Communications and  
Customer Experience Practice



Ready for Next



# Consulting services designed to take your communications to the next level.

Many companies want to get more value from their communications, but they often face these common challenges:

- Increasing operational expenses, including call centers, print, and postage
- Executing a broader digital transformation strategy that drives paperless adoption
- Keeping up with changes in industry regulations, security, and consumer expectations
- Lacking strategic insights and technologies across the communications journey
- Providing customer information in a seamless and preference-based manner
- Navigating cumbersome processes, workflows, and legacy technologies that impact the user experience and competitive advantage

# Actionable insight. Proven execution.

Supporting the communications spectrum, our team of industry experts offers a flexible approach to meet your communication objectives and requirements. We work with you to develop a clearly defined document, content, and digitization strategy that best meets your long-term objectives, including streamlined and optimized environments, improved internal efficiencies and cost reductions, enhanced user and customer experiences, and increased digital adoption.

Our assessments provide a comprehensive audit of processes and solutions across print and digital channels—from data to document creation through output. This enables our team to help develop a recommended strategic transformational roadmap and implementation plan. We benchmark, strategize, and execute, so your actions today position you for a more efficient and profitable tomorrow.

## AREAS OF EXPERTISE

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- Needs assessment
- Audit, benchmarking, and insights
- Customer journey mapping
- Print and digital transformation strategy
- Information design and content development
- Touchpoint analysis and optimization
- Preference management



# Proven results

Broadridge is a trusted advisor to many of the world's largest brands, and our communications consulting team delivers measurable results.



## Global Financial Services

### **25% COST SAVINGS**

The client achieved a 25% cost savings and delivered an improved customer experience by simplifying their internal document composition and delivery processes, platforms, workflows, and resource model.



## Retirement Fund Provider

### **30% COST SAVINGS**

By delivering an end-to-end transactional and marketing communications workflow and single composition platform, the client reached their goal of being a market leader in omni-channel communications while cutting costs by 30%.



## Global Credit Card Provider

### **REDUCED COSTS WHILE GAINING BUDGET**

Delivered a print statement redesign with a digital lens to improve customer experience, reduce call center costs, and drive digital adoption. Redesigned print statement included a reduced page count and an interactive digital statement prototype that helped stakeholders gain additional digital budget.



## Consumer Finance Company

### **SIGNIFICANTLY INCREASED DIGITAL ENGAGEMENT**

Created an enhanced email campaign that ran over six months to increase paperless adoption rates, consumer survey responses, and overall engagement. Open rates increased by 64%, click-through rates increased by 92%, and paperless rates increased by 754% from previous strategy.



## Brokerage Firm

### **STREAMLINED AND IMPROVED COMMUNICATIONS**

After evaluating 400+ unique client letter templates, the client eliminated nearly 50% of their letters and notably improved the content and design of their remaining templates.

# | Our services

## **COMMUNICATION STRATEGY AND TRANSFORMATION**

Evolve your strategy to meet customer expectations for personalized and engaging communications regardless of delivery channel or communication type. We evaluate your current communications management ecosystem, including composition solutions, software, communication platforms, and content, as well as print and digital delivery. We partner with you to strategize, benchmark, and implement process improvements and technology optimizations to address communication transformation initiatives that best meet your long-term objectives.

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## **INFORMATION DESIGN**

Improve your customer and prospect interactions with information design best practices. Our team provides subject matter expertise on the redesign of smarter print and digital customer communications. We provide the content strategy, concept wireframe design, customer research, technical validation, feasibility analysis, and functional prototyping necessary to help you deliver an optimal customer experience. Using a “digital first” approach, designs can be implemented efficiently across all channels with the flexibility to support continuous improvement.

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## **TRANSITION AND CHANGE MANAGEMENT**

Ensure a smooth transition and execution of your new strategy with our tested tools, comprehensive methodology, and expert resources. By working onsite with your team, our skilled transition consultants perform the following transition and change management activities to ensure your people, processes, and technology deliver the best outcomes: Resource Alignment, Communication Planning, Program Management, Application Management, and Transition Documentation.





## What you can expect

With our Communications and Customer Experience consulting services, you can:

- Improve the omni-channel customer experience with best practices and actionable insights
- Eliminate silos, optimize, and simplify the end-to-end customer communication workflow
- Optimize communications to reduce costs, decrease call center volume, increase clarity, elevate marketing value, and align with other KPI goals
- Improve document management processes via a well-defined print and digital communications strategy
- Reduce internal/external print procurement expenses while optimizing services, contracts, and costs

# Our expertise

Our team of industry-leading experts bring an unparalleled depth of insight and expertise to streamlining, digitizing, and optimizing transactional, regulatory, and marketing communications. From benchmarking and strategy through execution, we help our clients increase efficiencies, reduce costs, and improve impact across touchpoints.

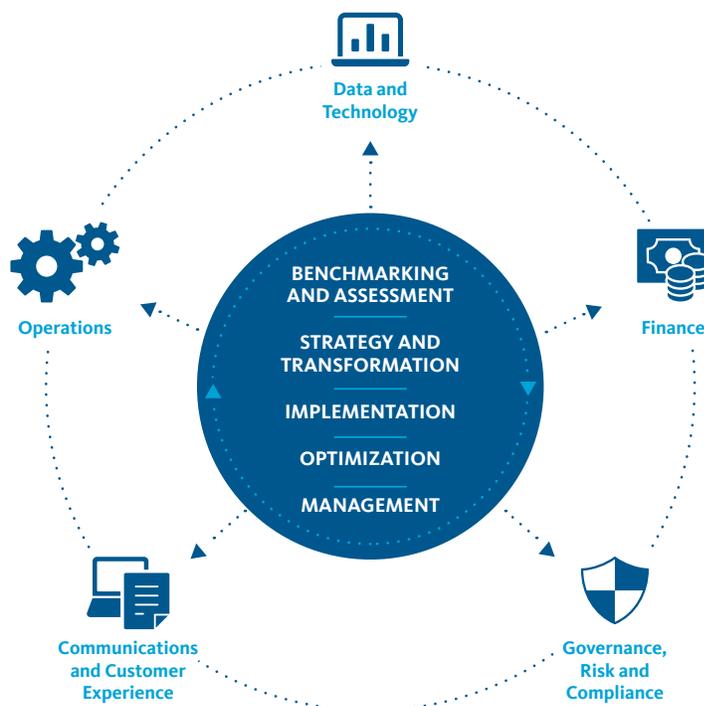
Communications and Customer Experience is just one area of Broadridge Consulting Services. Other areas of expertise include:

- **Data and Technology:** Market leaders master data across emerging technologies such as AI, blockchain, cloud and digital. We'll help you optimize, analyze and utilize that data in powerful and innovative ways.
- **Finance:** Financial processes, systems, statements and strategies are your lifeblood. We'll help you fortify them with insight, innovation and extraordinary discipline.
- **Governance, Risk, and Compliance:** Prudent policies and practices uncover the opportunities inherent in risk. Broadridge brings insight to uncertainty, helping you to address risk, regulatory and internal-audit requirements with confidence.
- **Operations:** Transformational change can impact every aspect of an organization. We'll help you chart and execute a roadmap for success built on best practices, practical insights and proven expertise.

By combining the best people, processes, and technology, each engagement is designed to achieve your desired outcomes.

**Let's talk about how you can make every communication more valuable.** Contact us today by visiting [broadridge.com](http://broadridge.com) or calling +1 (844) 450 7759.

## BROADRIDGE CONSULTING SERVICES



Broadridge, a global Fintech leader with over \$4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

[broadridge.com](https://broadridge.com)

Ready for Next

Communications  
Technology  
Data and Analytics



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