



CASE STUDY

Securing Client Communications at Beach Independent Financial Advisers



In financial services, secure and efficient client communication is vital. With data security regulations tightening and clients expecting seamless service, firms must ensure their communication tools are robust and user-friendly.

Beach Independent Financial Advisors (Beach IFA), a well-established financial firm, recognised the need to enhance security for client interactions while maintaining their high standards of customer service. By integrating Mailock, they have streamlined their processes, improved data security, and enhanced their clients' overall experience.

Who Are They?

Beach IFA operates with a strong team of advisers and administrators, offering financial advice for pensions, protections, and investments.

The team pride themselves on their customer service and client-first approach, taking the time to understand each person's unique needs and goals to tailor their financial guidance. This commitment also extends to maintaining top-tier data security and communication tools, ensuring the highest standards of reliability and protection.





"We needed to have something that secured all of the data and documents that we send over to clients and providers. Beforehand, we had to password-protect each document separately, so we needed something more robust and easier to use. After having the Mailock demo, we found it really easy to use, and the clients seem to like it too."

Jo Smith
Office Manager



Finding the Right Solution

Prior to using Mailock, password-protected documents were the typical method of securing sensitive information for Beach IFA. However, this process was time-consuming for the team and often led to accessibility issues for clients, who faced difficulties with opening documents.

Looking to remove the frustrations and delays associated with this method, Beach IFA searched for a more seamless solution for staff and clients.

They learned about Mailock through an existing connection, attending a demo in May 2022 and then undergoing a 3-month free trial. After evaluating its capabilities, the firm officially adopted the solution in July 2022.

Throughout the process, Beach IFA was particularly impressed with the support and resources available to them, with Office Manager, Jo Smith, sharing that: "The support at Beyond Encryption has been brilliant. It's nice to know we've got somebody to ask if we have any questions."

A Connected Financial Network

Beach IFA's decision to adopt Mailock was reinforced by the fact that many financial providers were already using it. This familiarity made the transition smoother, as they had already encountered the system while responding to secure emails.

This interconnected financial network has also helped Beach IFA streamline secure communications between their firm, their clients, and other industry professionals.

"Because some of our providers use it already, Mailock was already familiar to us. Now, when we send secure emails to those providers, they come up as a trusted contact, as we are regularly in contact with them."

A Better Way of Doing Business

Mailock has become an essential part of Beach IFA's daily operations. Whether exchanging sensitive client information internally or sending documents to clients, the firm has integrated Mailock into its core business processes.

Improved efficiency has been one of the biggest benefits, with staff now able to send emails securely in just a few clicks instead of manually encrypting each document. This has saved a great deal of time for their staff.

"We use Mailock all the time, as we're always emailing clients. Anything that we send to them, such as documents, forms to sign, client evaluations—any private information or sensitive data—we send via Mailock. It's efficient, easy to use, and professional-looking. Really happy with it."



Adapting to Consumer Choice

Adapting to consumer preferences is an important part of Beach IFA's client-centric approach. While most clients prefer receiving documents digitally, a small percentage still prefer traditional mail. The firm tracks these preferences in their system to ensure each client receives communication in their preferred format.

For clients of an older generation who were initially hesitant to switch to email, Beach IFA took a hands-on approach by guiding them through Mailock's secure email process. After a brief introduction, most clients quickly adapted and now prefer this method for its convenience and efficiency.

"It's about consumer choice—we have a little note on our system that tells us who likes what types of communication. There's only been a few people that haven't got on with email, so we send theirs in the post. However, the majority are happy to and prefer it by email."



"We send a lot less things by post now because we can send them quickly and efficiently by Mailock. Some clients still do like receiving documents by post, so we will send the occasional ones out, but the majority will go through Mailock."

Jo Smith
Office Manager





Client privacy, guaranteed

Maillock's secure email solution is the complete package for businesses looking to take their client communications to the next level.



Encrypting email



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can do for your business

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