



CASE STUDY

How MPA Financial Management Uses Maillock to Support and Safeguard Clients



In today's rapidly evolving digital landscape, secure and effective client communication is essential.

Financial services firms are increasingly facing the challenges of cyber threats and data breaches, and it has become imperative to deploy digital communication tools that safeguard sensitive client data.

This case study highlights how [MPA Financial Management limited](#) enhanced its client interactions with Maillock.

Who Are They?

MPA Financial Management is a chartered financial advisory firm based in Henley-in-Arden. Operating since 1988, they have over 30 years of experience and currently manage over £750 million worth of investments on behalf of their clients.

With 40 staff under their umbrella, MPA is renowned for its specialist services and has been ranked in the Top 100 adviser firms in the UK by Citywire for the last 10 years.





“We sat down with the team at Beyond Encryption to have an introductory talk and it was brilliant, exactly what we needed to support and protect our business and our clients.”

Annemarie Byrne
Head of Operations



Discovering Maillock

After the impact of COVID-19, many firms found themselves in a position of needing to adapt their services. MPA took the opportunity to completely overhaul their way of working to ensure business continuity, onboarding new software and processes that supported them and their clients when interacting online.

“We always want to be engaged with our clients and tell them what we're doing with regard to the business. So, we told them that we're changing the way that we work, and we're looking at how we can protect their data.”

As a company, MPA made the decision to focus on data security and how they could communicate safely with their clients. They spent significant resources on educating them about online threats such as phishing and ransomware attacks, while also working to choose and implement a solution that would protect digital communications.

That's where we came in. MPA was impressed with the Beyond Encryption team and the capabilities that Maillock offered, coming on board in early 2023.

Support from the Start

MPA received a high level of personalised support throughout the entirety of the process, from demo to purchase and beyond.

“Every step of the way we've had support, even up until now. I think the support staff that our in-house team liaise with are absolutely brilliant and that really does make a difference, especially when you want ease of the transition. I think everyone on the team was amazed that we could implement this overnight and be using it tomorrow, which is exactly what we did.”

Once the decision had been made to come on board with Mailock, MPA made use of the support and dedicated learning material provided by the Beyond Encryption team, introducing the solution seamlessly to their clients.

“What we said to our clients is: ‘Mailock forms part of the service we offer to you because of how important we feel that it is. We value you as a client and we value your information, and we want to ensure that any communication is as safe and secure as it can possibly be.’”



“As soon as we met the team, we could see that they have the same end goal in mind as us, which is making sure that data is protected for both us and for clients.”

Annemarie Byrne
Head of Operations





A Better Way of Communicating: Ease of Use

It was vital to MPA that they found a solution that wasn't overly complex and could easily be utilised by their client demographic. Mailock was a tick in the box when it came to ease of use, for both MPA staff and their customers.

"It's not convoluted, it's not really complicated, it's simple and effective and actually does what we need it to, which is protect clients."

Another key factor in choosing Mailock was the ease of integration with their current processes, allowing them to seamlessly slot the solution into Microsoft.

"We didn't want another piece of equipment that we've got to log into separately. It needed to be integrated as seamlessly as possible and that is exactly what's happened. The integration literally took seconds, and we were ready to go. It got rolled out within one day."

"Whenever you hear the term 'encryption', you start to think it's going to be complex to use with many different layers, but actually it's really simple."

Annemarie Byrne
Head of Operations



A Better Way of Communicating: Increased Efficiency

Before coming on board with Mailock, MPA transmitted sensitive data using password-protected documentation. While this method provided a level of protection, they found that the process was inefficient for their needs.

“Whenever anything left our building, it was password protected, and what we found was that it was really time-consuming. Sometimes we’d be sending 20 documents on an email, each one set with different passwords to ensure that if someone else got a hold of one password, they wouldn’t be able to open all of them. It’s just not efficient to do that.”

Mailock has offered MPA staff a quicker and more seamless experience, allowing them to send an email containing personal information securely with just a few clicks.

“It’s just become a way of the process. It’s not even a second thought now, and the benefits that we felt from day one have been instant.”

Now, MPA has a company-wide process for their use of Mailock, making it a core component of their client offering and stance on data protection.



“Across the board, anything that leaves our company that includes sensitive information is sent by Mailock.”

Annemarie Byrne
Head of Operations





A Better Way of Communicating: Heightened Data Security

With digital threats increasingly rising, MPA was aware of the need to protect the personal and financial data that they handle on a daily basis.

This move wasn't just a necessity to protect their business, but to safeguard their clients. Consumer awareness surrounding data security has also increased significantly, and MPA was determined to meet client expectations surrounding this.

“We know that we hold a lot of information in one place that, in the wrong hands, could be very detrimental. We want to give clients the peace of mind that they are with a reputable company that they can trust.”

Annemarie Byrne
Head of Operations



“Nowadays, it’s clients saying ‘How do you look after me? And how do you look after my data?’, which I think they've probably never really asked before and just assumed that that would be taken care of.”

After implementing Mailock within their organisation, they received a clear and positive response from their clients.

“Clients have actually thanked us for taking the time to take the risk off them and ensure that their data is safe when it's received, not only on our end but their end too.”

Catering to Client Choice

While digital communication such as email has become a key channel for business interactions, MPA understands that not everyone will be comfortable online, with 'some people still appreciating the touch of paper.'

However, they are aware of the negative impact that post has on the environment, as well as the rising costs and delays that are being increasingly experienced with Royal Mail.

"We want people to realise that this is why we're sending sensitive data via email. One – because of postal costs, two – there are huge delays, and three - you've got the fear in terms of data security."

MPA has spent significant time with its clients, exploring their familiarity and comfortability with technology and introducing Mailock as an easy-to-use solution.

"If they want it on paper, then we're happy to do that. If it's education and clients feel like they don't want to have it via e-mail because they don't know what to do or how that works, then we'll work with them and educate them."

This personalised approach is what makes MPA stand apart, with Mailock allowing them to add much-needed security to the familiar channel of email.



"For us, it's about offering clients choice. It's saying to them, "If you want it via e-mail, absolutely no problem, we're just adding another layer of security to it because we are aware of what can happen if your personal information gets into the wrong hands.""

Annemarie Byrne
Head of Operations





“When communicating with providers, we need to protect data and make sure it gets there quickly and safely, especially when there’s market movement and you're working with investments.”

Annemarie Byrne
Head of Operations



Creating a Secure Community

MPA feel passionate about the need for technology like Maillock to ensure secure and efficient comms across the industry – especially when it comes to providers.

“We need to make sure that information is safe when it's being received and that it's not getting into the wrong hands. In the same way that our emails can get hacked, so can a providers, and we've seen it happen before.”

Having everyone on the same page when it comes to data security is imperative for MPA, not only for the seamless operation of their business but for ensuring that clients are offered the level of protection that they deserve.

MPA are vocal supporters of improving cybersecurity within the financial sector, choosing providers based on shared attitudes and provisions towards this. When encountering organisations that have failed to take the appropriate steps, Annemarie always asks them: ‘Other providers are using it, so why aren't you?’



Client privacy, guaranteed

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



Discover what Maillock
can do for your business

