



CASE STUDY

Boosting Security and Client Engagement at Rapport Financial Strategists



In a fast-paced world, communicating with your clients quickly and efficiently is key.

Cybersecurity threats and data breaches are a growing concern for financial services firms, and reliable digital communication tools with robust security measures are crucial for protecting confidential client information.

This case study shows how [Rapport Financial Strategists](#) improved the security and effectiveness of their client communications.

Who Are They?

Rapport Financial Strategists provides financial planning advice for successful business owners, working professionals, and high-net-worth individuals. They have been established for over 20 years and have 2,500 clients in the UK.

Rapport has a reputation for consistently delivering high-quality, independent advice that has established them as experts within the industry and a trusted partner for those seeking to fulfil their financial goals.





“If you were doing a mortgage today, I would be asking you for 3 months of bank statements, 3 months of payslips - all of your documentation. Some of that may be collected by the adviser when they are with the client, but a lot of it was being sent to us by unsecured email. We wanted a system where we could send documents to them, and they could send them back to us on a secure basis.”



Deb Owen
Administration Manager,
Rapport Financial Strategists

Discovering Mailock

Before coming on board, Rapport Financial Strategists were using password-protected ZIP files to send sensitive documentation to their clients. However, this solution was cumbersome on both sides, causing more problems than it solved. They heard about Mailock from a third party and decided to undergo a trial.

Rapport began their trial period with a video demo and introductory session from our support staff. Deb Owen, Administration Manager at Rapport, explains how she quickly realised she had already encountered Mailock when liaising with insurance company, Aegon.

“I’d already used it to send and receive documents from Aegon, so I knew it was a good system and it’s relatively simple to set up and easy to use.”

Shortly after completing their trial phase, Rapport signed up with Mailock in July 2022.

Setup and Support

Integrating Mailock into existing workflows was simple for Rapport, thanks largely to how easy it is to set up and use.

“Sometimes when you get new systems and you’re trying to set them up, you think ‘Oh my god I wish I’d never bothered!’ But, once we’d had the demo with Carole and she told us how to set it up, it was a simple process.”

Implementing a solution that prioritised security and provided a frictionless experience was a necessity, for both Rapport and their clients. Mailock delivered both.

“A lot of the things that we do are very process-driven, so this has just slotted in seamlessly to the way we do our business every day.”

Deb also explains how the support during the first few weeks and beyond was excellent, with any queries from her colleagues being answered promptly and comprehensively.

Now, after using the system for a year, Rapport has seen a noticeable difference in the security of their comms and their peace of mind when it comes to sensitive documents.



“Mailock has improved our company in respect of data security. It's helped us to ensure that clients know that we're taking their data security seriously.”



Deb Owen
Administration Manager,
Rapport Financial Strategists



Always Connected

Day to day, Rapport Financial Strategists use Maillock to securely communicate with clients, providers like Aegon, and internally between members of staff.

Deb explains how important it was that Maillock allowed each member of the team to communicate safely, no matter where they were or who they were interacting with.

While Deb is predominantly based at the main office, Rapport's advisers are often on the road, while sometimes working from home. Maillock has enabled them to securely send messages and documents to individuals inside and outside of the business and support their hybrid working situation.

"I think it's made people more aware of data security. Instead of just sending something, they are taking that step to think 'Can I just send that, or do I need to secure it?'"

"From my perspective, me sending something to a client is exactly the same as me sending it to Brad, who is one of our advisers. It should be secure because only Brad should be able to access it."



Deb Owen
Administration Manager,
Rapport Financial Strategists

Engaging Clients: Maillock vs. Post

Deb reveals how email, especially now they are using Maillock, has enabled seamless two-way communication between Rapport and its clients, allowing them to come back to the business and request amendments or clarification easily.

“We send the majority of our documents to clients, where possible, digitally - we don't send it in the post because it's not reliable.”

Before using email for client communication, Rapport used to send out their recommendation reports in the post. As part of this process, they would include a declaration form for clients to sign to ensure they had received and read the documents. Unfortunately, the majority of the time, they never got those forms back.

Now, Rapport's clients no longer need to manually confirm they have received important documents. With Maillock's audit trail, which tracks when clients have opened a secure email or downloaded attachments, Rapport can be sure that their messages have been read.

“It's helped us because it's so much easier to know when a client's opened an email - you know that they've seen it, whereas, if you're just sending information out, even if you put read receipts on, they can ignore them.”



“Just over two years ago, we started sending all our reports by email and I find that people read it when you send it by email. I've noticed that clients are coming back and going, ‘can I ask about this in the report? or ‘can I ask about that?’. It's definitely a way for the client to engage more with the information that we're sending to them.”



Deb Owen
Administration Manager,
Rapport Financial Strategists



“Julie likes the personal touch. So, instead of saying to somebody ‘just upload it to the portal’, she'd rather have emails that go out to the clients that are a bit more personable. We like to hold clients' hands a bit through the process.”



Deb Owen
Administration Manager,
Rapport Financial Strategists

The Personal Touch: Maillock vs. Portals

When asked why they had opted for secure email rather than an alternative digital solution, such as a portal, Rapport explained that they preferred the ‘personal touch’ when it came to client comms.

Maillock facilitates a more personalised interaction than a portal, allowing Rapport to apply company branding and a unique message on outbound documents – a detail that Julie, the Director, appreciated.

Deb explains how Maillock has bridged the gap between generations and appeals to a wide selection of clients, no matter their demographic.

“People seem to like it, especially where you can send a text message. Our younger generation of clients love that because they see a text message on their phone, they know they've got an email from us and they can open it.”



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

