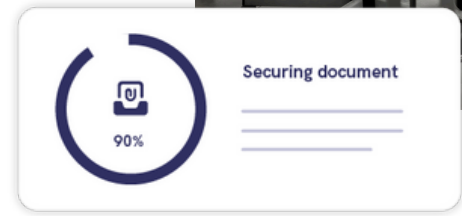


CASE STUDY

How Simple Financial Services Ltd Prioritises Client Comms with Maillock



For financial firms, ensuring the security of client information is just as important as providing expert advice.

For **Simple Financial Services Ltd**, protecting sensitive data while maintaining a seamless client experience has been a key priority.

This case study explores how Simple Financial integrated Maillock into their operations to enhance email security, improve efficiency, and strengthen client trust.

Who Are They?

Simple Financial is a financial advisory firm committed to providing clients with tailored financial solutions. Formed in 2000 by Managing Director, David J Bone, Simple Financial was created to deliver quality independent financial advice in the Scottish marketplace.

Understanding the importance of secure communication, they sought a system that would protect sensitive data while being easy to use for both their advisers and their clients.





"What triggered us to look into email security in the first instance was all the reports online about scams. Obviously where we're sending out sensitive data like account details, bank details and things like that, nowadays that can't be sent unsecurely."

Fraser Bone
Financial Adviser



Coming on Board with Maillock

The decision to implement Maillock was driven by the increasing threat of cybercrime and email fraud.

With cybercriminals becoming more sophisticated, the firm knew that traditional email methods left their clients vulnerable.

Instead of opting for a client portal, which can be cumbersome for users, they prioritised a secure email system that integrated seamlessly with their existing workflow.

They explored various solutions before ultimately selecting Maillock in 2023.

The transition was smooth, allowing their team to adopt secure communication practices without disrupting client interactions.

A hand is shown writing in a notebook on a desk. The desk also has a small green plant, a pair of glasses, and a smartphone. The notebook has a 'Memo No.' and 'Date' field at the top.

A Responsive Support Experience

Support is a crucial factor when adopting new technology, and for Simple Financial, team responsiveness played a major role in their choice.

Beyond just fast replies, the Beyond Encryption team provided clear and detailed guidance, ensuring that they fully understood the platform's capabilities. By having immediate access to knowledgeable support, the firm was able to maximise their use of Maillock from the outset, making it an integral part of their communication process.

"When we first contacted Beyond Encryption, and also when I've had any account queries, there's always been a pretty instant response. The interactions with ourselves and how well everything was explained was the main reason we went with Maillock."

Embedding Maillock into their Workflow

Simple Financial primarily uses Maillock for securely transmitting and receiving sensitive financial data, including meeting summaries, bank details, and investment information. By embedding Maillock into their post-meeting workflow, they ensure that clients can respond securely and confidently.

"Whenever we send over account or fund information that's personal to the client, we make sure it's sent over securely and can't get intercepted."

This consistent approach reinforces their commitment to client safety while making secure communication an effortless part of their daily operations.

"All personal information, like bank details and national insurance numbers, we will request via Maillock. We then get clients to reply within the secure email system so that they know it's safe."

Benefits of Maillock: Ease of Use

Introducing new technology to clients, especially those unfamiliar with digital security tools, can sometimes be a challenge.

However, Maillock's simplicity proved to be a major advantage.

"Ease of use for us as well as the people we're sending emails out to is the most important thing."

By prioritising ease of use, the firm ensured that their security enhancements didn't create unnecessary complications.

The system's user-friendly design made it accessible to all clients, regardless of their level of technical expertise.



"Our main focus is client interactions, especially where we're dealing with a lot of older clients. When you introduce a new technical system, it needs to be easy for everyone to use. When we first tried Maillock out, everyone took to it really well and found it simple to use."

Fraser Bone
Financial Adviser





Increased Client Trust

Trust is fundamental in financial services, and clients have become increasingly aware of the risks associated with unsecured communication.

“People are getting quite wise to things being sent over to them unsecurely and know that it’s an issue.”

By implementing Mailock, Simple Financial Services Ltd demonstrated their commitment to protecting client data. The positive response from clients has reinforced their reputation as a firm that prioritises security. This proactive approach helps clients feel reassured that their personal and financial information is handled with the utmost care.

“It’s a way of showing your clients that security does matter to you. People appreciate it being secure, and that everything is sent over securely in such an easy system.”

Improved Efficiency

Managing financial transactions often requires exchanging sensitive information quickly and securely. Before Mailock, this often meant time-consuming phone calls or back-and-forth communication to confirm details. Now, those processes have been streamlined.

With Mailock, advisers can focus more on delivering financial advice and less on administrative hurdles, leading to a more efficient service for both the team and their clients.

“Mailock reduces the time needed to speak to clients over the phone. Instead of having to be like ‘Oh, have you got a moment to speak over the phone?’ and trying to chase each other to get details, there’s the option to go ‘I’ve sent you that via secure mail’.”



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

