

# MAKING IT COUNT

TD WATERHOUSE UTILISES THE LATEST TECHNOLOGY TO IMPROVE CUSTOMER COMMUNICATIONS AND GENERATE COST SAVINGS

## CASE STUDY

### FACTS

TD Waterhouse (TDW) is a leading UK brokerage firm providing web and phone share dealing services across multiple brands.

TDW sends over three million documents to customers each year. In 2007 TDW challenged Computershare to identify how they could improve customer accessibility to information, support a multi-branded offering, drive down costs and lower environmental impact.

### CRITICAL ACTION

TDW took advantage of Viewpoint, Computershare's online document management solution, which enables customers to choose how they wish to be communicated with, be it via the web, email or post.

Viewpoint also allows TDW staff online access to all outgoing customer documents, regardless of the customer's chosen method of communication. This enables staff to retrieve, view and resend documents (via post or email) quickly and efficiently during customer calls.

### RESULTS

TDW has already received positive feedback from customers, with up to 50% now receiving documents online. This represents significant cost savings for TDW in print and postage.

In addition, TDW's contact centre agents can now view exactly the same document online that the customer has in front of them. This has meant a cut in average call lengths, resulting in further cost efficiencies and improved customer service.

0.873	0.186	-	1.02%	↓	20.232
0.1123	1.1601	-	1.16%	↓	0.186
0.118	1.662	+	0.16%	↑	11.600
1.121	0.1201	+	0.10%	↑	N/A
0.232	1.0233	-	1.53%	↓	10.201
0.186	1.1611	+	1.15%	↑	13.203
0.601	0.1602	-	0.87%	↓	N/A
0.62	0.105	-	0.11%	↓	20.160
0.01	1.230	+	0.11%	↑	N/A
0.3	1.1577	+	1.12%	↑	N/A
0.1	0.873	+	3.23%	↑	1.66
0.1150		-	2.14%	↓	10.2
0.1123		+	2.18%	↑	0.8
0.118		+	1.16%	↑	1.1

**"Computershare's Viewpoint system has enabled us to reduce production costs while also offering our customers real choice in how they view their financial statements."**

Dave Sparvell, Senior Investor Services Manager, TD Waterhouse Investor Services (Europe) Ltd

COMPUTERSHARE INVESTOR SERVICES PLC  
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# VIEWPOINT > A BETTER EXPERIENCE FOR YOUR CUSTOMERS

Data is uploaded from TD Waterhouse

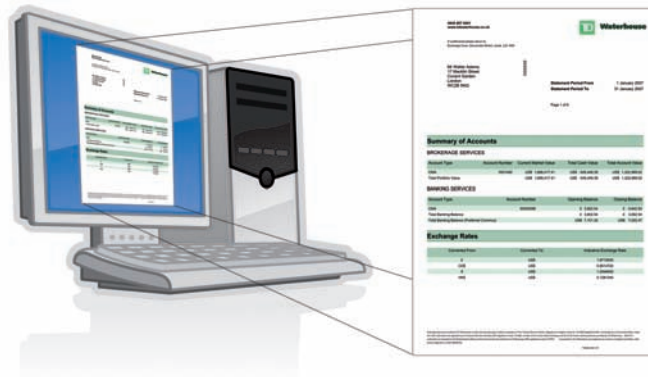
## Viewpoint

Document viewing for all parties

Branding and personalisation in TDW look and feel

PDF image creation

Secure document storage

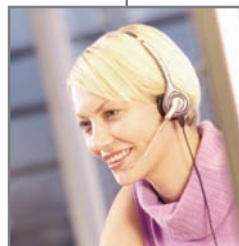


Customer receives an email advising that his statement is available to view online

@  
Secure log in



Customer



TDW Contact Centre



Intermediaries