



**PwC's Connected Government
thought leadership series**

Correspondence management

How simpler, faster correspondence management
is a win for government and citizens





Correspondence – either via letter, online message, email or SMS – is one of the key points of interaction between governments and customers. It's critically important to get it right, especially as government services move to digital channels, reducing the need for face-to-face or call support. Correspondence can make or break an excellent customer experience.

Yet, when you boil it down, government correspondence doesn't get a great rap. Feedback shows that government correspondence is often perceived as difficult to understand, overly complex, legalistic or not tailored to the individual. There's either too much information or not enough. It doesn't feel personal and it doesn't always consider the barriers that customers may face in accessing or understanding the correspondence.

There have been major improvements. Just 10 years ago the vast majority of government correspondence was paper-based. Today it's increasingly digital and sent through secure channels like myGov. More and more, correspondence is automated and integrated into core systems. Key interactions are often complemented by text messages to remind or nudge customers. And increased use of behavioural insights, targeted customer research, and content simplification projects have led to simpler, customer-centric correspondence.

However, there is still a long way to go. Clarifications and questions relating to correspondence is a major driver of inbound calls for staff assistance. While key correspondence products have advanced, improvements haven't been rolled out across all correspondence and the ever-evolving nature of service delivery

requires new correspondence on an ongoing basis. Moreover, many templates are locked into legacy systems, which makes them costly to improve or require staff members to generate or edit them manually.

In the drive for digital transformation, structural improvements to correspondence often lose out to 'innovative' contenders like digital platforms, virtual assistants, automation and artificial intelligence (AI).

Correspondence transformation is complex, but the payoff is great. The key is to align business outcomes, experience and technology (BXT).

Tackling the challenges of correspondence through BXT

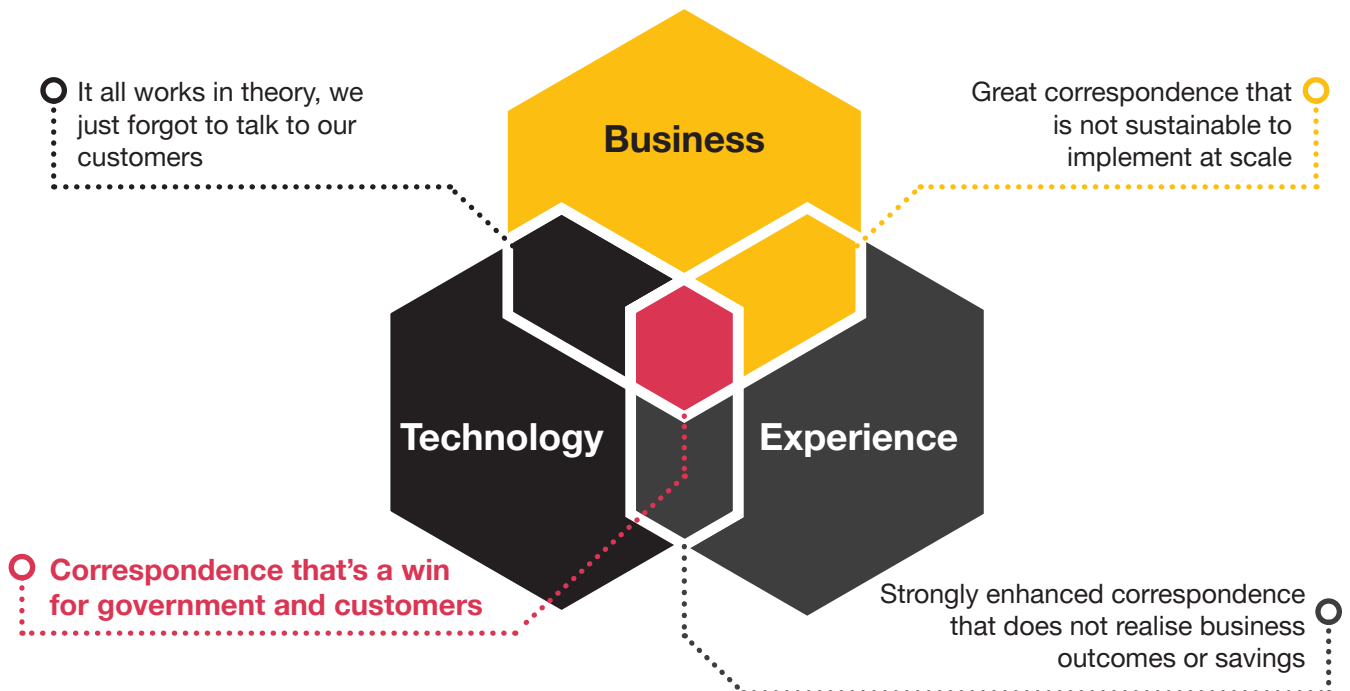


We apply a simple, intuitive framework to transform correspondence so that it's sustainable and easily configured, delivering a better customer experience and realising business outcomes even as needs change.

This framework tackles the challenge from three angles: Business, Experience and Technology

(BXT). Too often, correspondence improvement is approached with a single lens. Many improvements focus solely on customer experience by enhancing content. Or they focus on technology through new systems and functionality, while others are limited to process changes or rationalisation. On their own, however, these approaches fall short.

To get it right, any improvement initiative needs to combine clear business, experience and technology changes. All three lenses are essential, and all three must be integrated. Let's unpack this.



Business

How do you build value from correspondence?

1

Define and challenge the purpose

Rationalise correspondence by asking yourself if it needs to be sent in the first place. In most cases there's a clear legislative, business or policy requirement for communication, but sometimes correspondence is unnecessary.

Where there is a need, be clear on the purpose of the correspondence and ensure it aligns to business objectives. Most correspondence templates (especially letter templates) have been around for years. Check your correspondence still achieves its aim, and update where needed. Purposeful correspondence can reduce customer queries, boost take-up of online services, and improve customer outcomes.

2

Choose the right channel and mix it up

There's a drive to move correspondence to digital channels, and we've seen significant growth in the use of online letters (mainly through the digital platforms, as well as SMS, email or app notifications). This makes sense when you consider the cost of delivery of digital correspondence is a fraction of its paper-based equivalent.

When choosing the right channel, review existing correspondence and, where possible, transition to digital channels in line with a customer's preference. Next, roll out a communications campaign to encourage customers to take up digital correspondence.

For certain high-value transactions there's an opportunity to mix things up and use cross-channel correspondence (for instance, digital channels, supplemented with outbound calls, to achieve cut through).

3

Focus on value for money and measure impact

Ensuring that correspondence provides value for money requires a strong understanding of the costs of sending and managing correspondence. In addition, it is key to quantify the impact. How many customers take action? How many call? How many stay in channel?

Measuring the direct and indirect impact of correspondence can have a major effect on an organisation's ability to realise its business objectives.

Value for money is more than just rationalising correspondence or increasing efficiency of delivery; it means using correspondence as an opportunity to realise value. Adding a simple nudge message to encourage action, or simplifying content to reduce inbound calls, are small improvements that can have significant return on investment.

Experience

There's a range of ways to improve the correspondence experience, so where to start and what principles to apply?



1

Understand the customer and the end-to-end journey

Effective correspondence is grounded in a strong understanding of customer needs. Know your target audience through targeted research, data and experience. And consider customers who face barriers in accessing or understanding the correspondence and its call to action. Doing so will make sure that those individuals who need support the most have access to it.

Equally important is a deep understanding of the end-to-end process. Correspondence is often part of a much broader engagement between the customer and your organisation. Understand what came before, and what the customer is expected to do afterwards, to make sure the content, channel and timing is the right fit for the customer.

2

Content is king: keep it simple and tailored

Content is crucial. Think: simplified, jargon-free, plain English and designed for equal access. It includes consistent content across channels and interactions. There has been important progress over recent years, but there is still a way to go. Resources like the 'Australian Government Style Manual'¹ can help you craft readable correspondence.

But simple and clear content is not enough. Customers increasingly expect personalised and transparent experiences. Most government organisations have the data to provide this, however, it can be costly to apply at scale.

3

Consider your staff experience

When simplifying content or improving systems, consider the experiences of your staff. Many correspondence products are manual or require staff to personalise correspondence and adjust existing templates. The more complex the correspondence, the greater the staff investment. Additionally, all too often it is the front-line staff that will have to navigate the unintended effort of a correspondence strategy that is not well thought through.

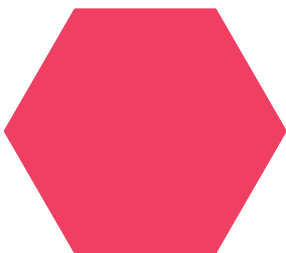
It's not enough for correspondence to be technically and legally correct; it must also demonstrate empathy and simplicity. Here, staff training and targeted quality reviews are key.

4

Go beyond

One solution is to 'go beyond' the traditional construct of correspondence and replace it with personalised online and mobile services. Well-designed services and transactions provide new opportunities to visualise customer circumstances, allowing customers to interact with content in a way traditional correspondence can't do.

Instead of doing the heavy-lifting itself, more and more correspondence will just be the messenger that redirects customers to more tailored digital services. This doesn't mean the other elements of our BXT framework no longer apply: they are still critical to get right and it will require organisations to get more out of their technology.



¹ <https://www.stylemanual.gov.au/>

Technology

So as the stakes are raised to realise business value and deliver a seamless experience through correspondence, where should you focus your technology investment?



1

Engagement platform

Customers expect a seamless experience. Maintain a 360-degree view of the customer through a simple and lightweight engagement platform, so staff can access relevant customer data, including all previous interactions, in a single view.

An engagement platform provides end-to-end correspondence capability that supports the full correspondence lifecycle. This will not only provide a flexible solution with easily configurable templates, but an adaptable platform that can be modernised as customer and organisational needs change. There are a range of off-the-shelf products available that can provide a cost-effective starting point to modernise correspondence.

2

Data integration

Customer data is central to effective engagement, personalised and meaningful correspondence. Customer data is generally stored in multiple systems of records. Unlock data using application programming interfaces (APIs) and integrate it into a simple architecture comprising:

- i. **service layer:** sits outside the correspondence engine, managing customer information and communication, and decoupling direct connections to the system of records. Common challenges include security, data privacy, any legacy environment connectivity, and interoperability with core systems.
- ii. **communications engine:** potentially cloud based, managing all correspondence functions, from templates to deliverability. Common challenges are interoperability with existing outbound correspondence frameworks, and integration with future whole of Australian government (WoAG) platforms such as myGov.

3

Journey-based engagement

Customer preferences need to be managed and respected and correspondence should be personalised. Engage with customers based on their life events to drive trust. (An insights-to-action approach, powered by AI, can support this.) And choose communication methods – including frequency and channels – to suit customer needs.

The building blocks of journey-based engagement include:

- digital forms to engage with customers in a dynamic conversation
- correspondence templates with configurable content blocks
- analytics capabilities to identify customer insights as well as data visualization capabilities
- inbuilt security measures such as encryption, monitoring and auditing
- robust customer identity approach including connection to WoAG identity framework .



So, where to from here?

While the BXT framework may be straightforward on paper, we know that transforming correspondence is not without challenges. There is no silver bullet and it will require a targeted investment in time and resources to see it through. But regardless of whether you are just starting your transformation or are well advanced, there are a number of steps you can take now:

1. Take stock

Taking stock and reviewing your organisation's ambition can be an effective starting point. At the start of the transformation journey this includes key steps like consolidating correspondence artefacts, capturing volumes, consolidating customer insights and defining the existing technology landscape. When further advanced, this means reviewing your initiative against the BXT framework to check if it's set up for success or whether a course-correct is required. In both cases, identify any potential 'quick wins'.

2. Define the transformation roadmap

Defining a clear roadmap that plots the transformation initiative over time is a key next step. Developing the roadmap will not only enable you to seek buy-in from key stakeholders, but, using the BXT framework will help you include key activities that ensure the transformation initiative is sustainable, delivers a better customer experience, and realises business outcomes.

3. Prioritise improvements today, while building functionality for tomorrow

When developing the roadmap and starting the work, it is key to realise a number of quick wins, while taking time to deliver structural improvements like new platforms or systems. This could include transforming high-volume and high-impact correspondence or testing and trialling off-the-shelf technology. Doing this will allow you to celebrate success, gain insights and learnings and realise some benefits early on. And most importantly: it buys time. Effectively scoping and prioritising the short-term improvements will reduce the need to retro-fit them once the structural improvements are delivered.





This perspective is shared as part of PwC Australia's Connected Government thought leadership series. Reimagining citizen services and digital products by connecting the brand promise with how governments operate, resulting in a seamless, human experience.

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Contacts



David Tan
Partner and AU & APAC
Salesforce Leader

+61 413 887 220
david.a.tan@pwc.com



Frank van Hagen
Director, Consulting

+61 459 327 778
frank.van.hagen@pwc.com