



# LV=

## Complaints management excellence for compliance and customer care

### CASE STUDY

#### Customer Details

LV= is a mutual protection, savings and retirement provider whose roots go back to 1843. Now it provides a range of financial solutions to 1.3 million customers and members in the UK.

#### Industry

Insurance

#### Aptean Solution

Aptean Respond with QA and BI modules

#### Challenges

- Efficient complaint management
- GDPR information requests
- MI reporting and collating customer feedback

#### Benefits

- A single solution for multiple processes
- 40% reduction in open complaint volumes
- Flexible, accessible and in-depth reporting
- Streamlines complaint resolution
- Enhanced customer experience

Jenny Briars is the manager of the team that handles customer complaints at LV=. She explains, “At the moment, our team is kept busy dealing with not just complaints, but PPI requests and GDPR information requests, too. Regardless of the scope or volumes we’re faced with, our priority is always to secure the right outcome for the customer.”

### Digitizing complaints management

Back in 1996, LV= was using a ledger to record complaints, with all complaints manually logged and updated. This process was fast becoming unfit-for-purpose as customer numbers increased and as society in general became more heavily digitized. After a thorough assessment of the market, the business implemented Aptean’s case and complaints management solution, Aptean Respond. As Jenny remembers, “Aptean Respond revolutionized how we dealt with complaints, securing real efficiencies for us in terms of how we managed the entire process.”

### Complaints management excellence

Today, LV= uses Respond because of its ability to support the entire complaints management process in a single solution. Through giving front-line staff access to key information as well as the ability to update information directly in the system, it reduces any duplication of effort and streamlines complaint resolution for an enhanced customer experience.

Jenny continues, “Contact center staff can get the best possible outcomes for customers as they can see at a glance the workload they’re dealing with, enabling them to prioritize their daily activities. Comprehensive case management, including diary tasks, makes the process easy and it’s straightforward to get any new team members on board.”

Most recently, LV= has used Aptean Respond to underpin a new team that’s been set up within the complaints team, responsible for the immediate escalation of urgent complaints and customers in vulnerable situations. Tasked with investigating the customer’s situation and securing the right outcome within 24 hours, the effect that this new process has had on the business has been fundamental.

As Jenny explains, “This approach has revolutionized the turnaround times for complaints as a whole, doubling our informal resolutions within the FCA’s eight-week time frame. Respond has impacted our open formal complaint volumes immensely, reducing them by 40%. Most importantly, the customers are getting quicker outcomes with a greater focus on their specific needs.”

## Robust reporting

The breadth and depth of the management information available is crucial to both regulatory compliance and planning. As Jenny explains, “We’re not constrained by system parameters, enabling us to slice and dice reports to meet the particular needs of LV= at any moment in time, with interactive dashboards presenting the information in an easily accessible format. And, when it comes to compliance, this comprehensive reporting capability allows us to demonstrate transparent, robust complaints management to the regulator, too.”

## Not just complaints

Where Respond has really come into its own over the last few years is through its ability to be used for more than just complaints management. Currently at LV=, all GDPR information requests are processed using Respond. Similarly, the team uses Respond

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**Jenny Briars**  
Complaints Manager

to capture customer feedback, something that’s proving invaluable for the business. As Jenny explains, “Although we’re not required to report this feedback to the regulator, from a business development point of view, we use the detailed, specific feedback that is possible to capture in Respond to help us to continually improve customer service.”

## Working partnership

Jenny explains, “In 2018, we conducted a thorough assessment of the market and Aptean Respond came out on top in every area. There really was no comparison on cost, functionality and support. Everyone we deal with at Aptean is very helpful and always available to answer any questions we might have. They’re also really good at listening to what clients want, making valuable changes and additions to Respond following our feedback and suggestions. We have a great working partnership with the team, which, when combined with the functionality and effectiveness of Respond, shows why we’ve used it for so long.”

Jenny is also a big fan of the regular Complaints Working Group events that Aptean facilitates throughout the year; events which bring together professionals from across the industry to discuss the challenges they face. Jenny highlights, “It’s great to have the opportunity to have a full, frank and open discussion with your peers, deliberating the very issues that keep us all awake at night and often finding common solutions that we can implement back in the office.”

## Migrating to SaaS

In spite of the continued success of handling complaints effectively and efficiently, LV= continually looks at ways to improve the performance of its complaints management. While the solution is currently on-premise, LV= will soon be moving to a SaaS model.

Jenny concludes, "Respond lies at the very heart of our complaints management function, giving us the ways and means to successfully manage the whole process. The ease of access to the right information at the right time is the key to its success. We've used the solution for over 23 years and I can't see that changing any time soon."

For more information about Aptean Respond, contact your account manager or email us at [info@aptean.com](mailto:info@aptean.com).

"The comprehensive reporting capabilities allows us to easily demonstrate transparent, robust complaints management to the regulator. We use the very detailed, specific feedback that it's possible to capture in Aptean Respond to inform our RCA, helping us to continually improve our levels of customer service."

**Jenny Briars**  
Complaints Manager



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