

LOST AND FOUND

GEORGESON'S EXPERTISE HELPS TRACE AND VERIFY RELIANCE MUTUAL'S MISSING MEMBERS

CASE STUDY

FACTS

Reliance Mutual Insurance Society Limited, a life assurance and pensions provider, needed to re-establish contact with 13,500 missing policy holders before an important member communication was despatched. Reliance Mutual previously made some attempts to locate and make contact with their missing members, including use of an external data cleansing agency, but with limited success.

To ensure their records were up to date and to meet FSA obligations, Reliance Mutual appointed Georgeson.

CRITICAL ACTION

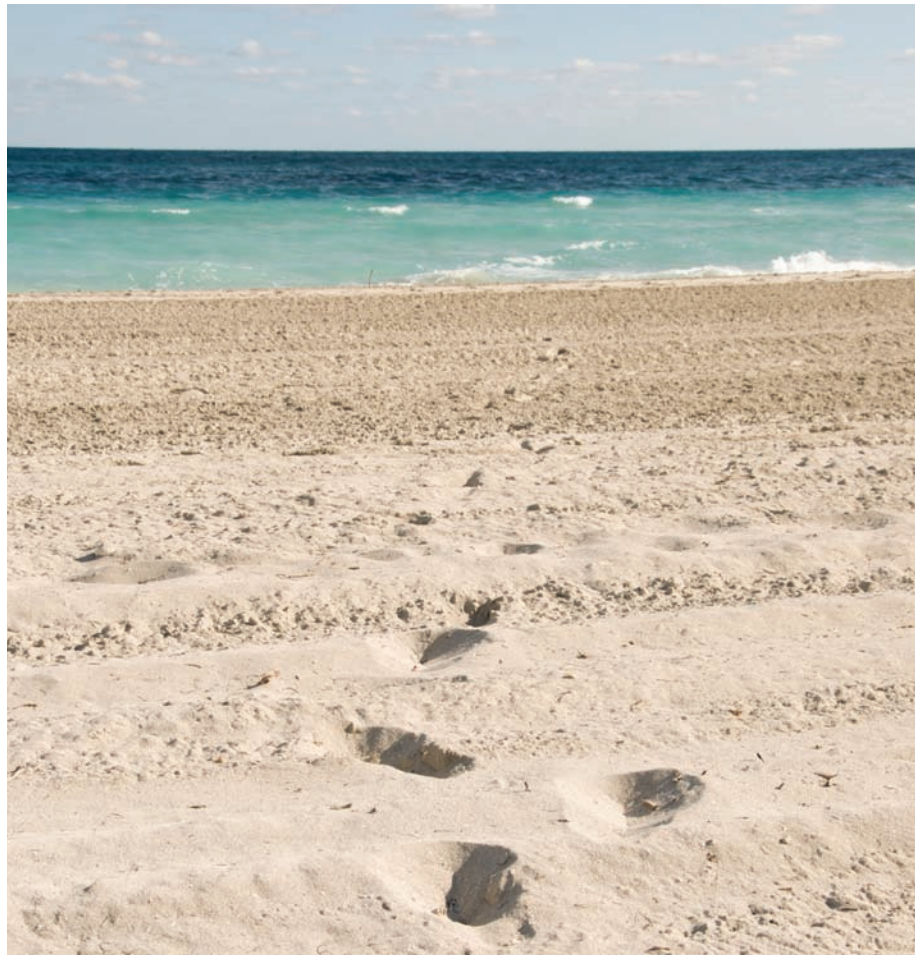
Georgeson was tasked with planning and delivering a fully managed tracing and verification project. The age and quality of some of the data provided Georgeson with an enormous challenge.

Within days, a full data audit was completed and confirmed a significant number of members were potentially deceased or had moved.

Georgeson's specialist research team then undertook the task to trace and engage lost members using an established research methodology, investigative outbound phone calls and correspondence. To positively identify members, Georgeson also completed a full identity verification process.

RESULTS

Georgeson has traced and verified the addresses of 70% of policy holders, allowing Reliance Mutual to update their register of members with confidence in preparation for an important member communication.



"Georgeson were able to deliver exactly what we needed to meet our requirements and do the right thing for our members. They adapted their approach to our requirements and delivered in short timescales. We would be happy to work with Georgeson again."

Chris Lerpinière, Head of Operations, Reliance Mutual Insurance Society Limited

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