

# Citizens Advice Manchester Leveraged Virtru to Unlock a Digital-First Approach to Correspondence and Improve their Client Experience

“Using Virtru helped us develop our reputation as an early adopter of technology within the charity sector. We can easily prove to clients that we take their security and privacy seriously, and the speed with which Virtru allows us to communicate securely with clients opened the opportunity to provide better service and help more people.”

- **Stuart Pearson**  
Chief Digital Officer, Citizens Advice, Manchester

The **Citizens Advice** network is made up of 280 independent charities. Supporting nearly 55,000 individuals per year, the Manchester office provides free, independent, confidential advice to UK citizens on a wide range of subjects, ranging from housing, debt, healthcare, benefits, and employment. We spoke with **Stuart Pearson, Chief Digital Officer at Citizens Advice Manchester**, to learn why he and his team selected Virtru as their data protection and privacy solution for their digital transformation. With Virtru, Citizens Advice Manchester was able to:

- Improve client communication speed and effectiveness by shifting from post to email.
- Serve more clients in less time.
- Quickly pivot to digital workflows when the COVID-19 pandemic hit.

## What are the most critical or problematic data protection issues facing Citizens Advice Manchester today?

“The nature of our service is such that most of the information we collect and share contains sensitive and confidential data—such as a client’s financial situation, health conditions or personal information. Our clients come to us in times of need and it is our duty to advise them and protect them, and this includes their data. We value our clients’ data just as much, if not more, than we value our own data. Of course, we also have to ensure that client data is protected in accordance with GDPR throughout correspondence with clients and third parties.

“I’m personally responsible for the organization’s technology infrastructure and strategy. The tech itself

is easy to manage; our team of advisors uses G Suite and Chromebooks. The bigger issue is ensuring that sensitive data doesn’t end up in the wrong hands. Historically, we’ve relied very heavily on the post for client correspondence, but it was still possible for paper documents to go to the wrong place. Lack of control and high postage costs meant that it was time to invest in digital solutions.”

## What was the breaking point that led you to Virtru?

“There were a number of driving forces, but the most significant one was that more clients were expecting correspondence to be digital rather than paper-based. Clients were saying, ‘Can you just email me that,’ which without encryption software would have opened us up to huge risks.

“Before finding Virtru, our workarounds were zipping documents and using password protected documents. This was far from ideal. The other big driver, aside from reducing postage costs, was our need to boost the speed of correspondence. For many of our clients, their issues are time-sensitive and we didn’t want paper correspondence or clunky tools to slow down our services. All of these factors combined meant that we needed to make digital correspondence the channel of choice. With that, we knew we needed an encryption solution.

“Virtru offered us the reassurance that our clients’ sensitive data was protected at all times and it was a game changer in more ways than one.”

### **What benefits have you seen from using Virtru?**

“We rolled out Virtru shortly before the COVID-19 pandemic and of course we didn’t know that was coming. At first, one of the biggest benefits was that we were able to cut down on our costs. We spent roughly £15,000 per year on postage alone. The investment into Virtru represented a significant saving when compared to the cost of postage.

“Then the pandemic hit and lockdowns began. Fortunately, we were in a good place to pivot the business and all of our technology investments—G Suite, chromebooks, and Virtru, to name a few—made that relatively straightforward. On the client side however, face-to-face client sessions were no longer an option,

but their need for help had not changed. In fact, for many it had intensified. With more interactions happening online than ever before, our Virtru usage increased almost tenfold. Change management is hard and there is always some hesitation from users when new technology is introduced, but the shift to digital workflows meant that our advisors quickly got comfortable protecting client data with Virtru.”

### **How have specific Virtru features allowed you to improve client experience?**

“There are four that come to mind: read receipts, DLP rules, one-click access, and custom branding. Read receipts allow us to follow up with clients that we know are vulnerable and may need additional help. DLP rules help our advisors comply with data privacy requirements by reminding them to toggle Virtru on when sharing sensitive data. One-click access is helpful in enabling a small number of our less tech-savvy customers to overcome their issues accessing their emails. And finally, the custom branding (including our logo) reassures our clients that messages sent using Virtru really are coming from their trusted Citizens Advice advisor.

“These features work together to give our clients the digital experience they were looking for, while providing them with the assurance that Citizens Advice takes the responsibility of protecting their data very seriously.” ●



“If we can reduce the amount of time that advisors spend not advising, then that means we can help more people. Virtru made that possible for us.”

- Stuart Pearson, Chief Digital Officer at Citizens Advice Manchester



For more information on how Virtru can unlock secure, GDPR-compliant digital communications, please get in touch with us to learn more. [virtru.com/contact-us](https://virtru.com/contact-us)