

CASE STUDY SUN LIFE DIRECT

Sun Life Direct is part of the AXA Group, delivering approximately 90% of direct mail campaigns for the group. It also distributes products directly and indirectly to end consumers via channels such as DRTV, press, inserts and online, as well as via telephony and point of sale through key business partners including Nationwide, Santander and Britannia Building Society.

Sun Life Direct played an integral role in the PAS 2020 assessment and certification pilot scheme and is one of the first companies to gain successful certification to the standard. The company decided to implement the standard in response to customer, regulator and employee feedback about the environmental impact of its direct marketing – in particular direct mail.

Client Objectives

- To meet stated company CSR objectives
- To reduce the environmental impact of direct marketing
- To demonstrate a commitment to continual environmental improvement to customers, partners and employees, in a credible manner
- To reduce the need for regulatory intervention
- To reduce costs
- To make the most of available Royal Mail discounts

Business Achievements

- Competitor advantage achieved by being 'first mover'
- Cost savings achieved by reducing volume of mailing and also being able to benefit from Royal Mail's Responsible Mail scheme – £150k per annum
- Positive sustainability brand message during Sun Life's 200th anniversary year
- Improved employee satisfaction
- Positive internal PR from executive committee and managers across the AXA group



“Achieving PAS 2020 allows us to take advantage of the maximum level of discount available from the Royal Mail. That along with reduced mailing volumes translates into a net financial benefit of over £150,000 per year. These cost savings are absolute and verifiable”

**Colin McDougall, Head of Distribution,
Sun Life Direct**

▶▶ FAST FORWARD WITH BSI TRAINING

BSI offers a comprehensive portfolio of environmental management training courses. Visit www.bsigroup.co.uk/training or call **0845 086 9000** for details.

Background

Sun Life Direct (SLD) is a Bristol based business that is heavily outsourced as well as employing approximately 150 staff directly. The staff are responsible for product design, customer experience, customer insight brand, data management and the planning and delivery of marketing communications using strategic supplier relationships. A key partner is Williams Lea who is also one of the first organisations to achieve certification to PAS 2020.

Why PAS 2020?

Root cause analysis of 'voice of customer' and 'voice of dissatisfaction' data highlighted concerns regarding issues such as over contact and waste. In addition to this, Sun Life Direct's research demonstrated that the environment was a key concern to its customers.

"Doing nothing is not an option," says Colin McDougall, Head of Distribution. If the direct marketing industry of which SLD is a key player, does not address these concerns, then there is a danger that policymakers, local, national or European, may feel the need to do so. At a group level AXA has a corporate responsibility strategy of which one of the key pillars is to 'reduce the environmental impact of our day to day operations by consuming fewer resources and generating less waste'. With high volume of direct mail activity it is clear where SLD should focus its effort on behalf of the Group."

Benefits from implementation

"The key benefit to our customers is that they can be assured that they are dealing with a company that takes environmental issues seriously and they will be not contacted unnecessarily," says McDougall. "PAS 2020 can only enhance the reputation of our brand and provide us with new PR opportunities which

are likely to increase as awareness of the standard grows. We believe this in turn will help in our dealings with other business partners who we know are investigating PAS 2020."

"We are very proud to be one of the first companies in the UK to achieve full certification – certainly the first in the insurance industry," he says. "We hope our certification will also reduce the impact on Sun Life Direct of any regulatory intervention which could reduce our ability to use direct mail as a core marketing channel. An added bonus to Sun Life Direct is that the learnings from the assessment and certification process will be fully transferable to other AXA strategic business units who are either existing or potential users of direct marketing."

BSI's Role

Sun Life Direct chose to work with the BSI because of its reputation for helping businesses improve their environmental performance. The company initially considered self declaring compliance to the PAS 2020 standard, however was concerned about the objectivity of the exercise and the credibility of any claims made on this basis.

"With all of the green wash out there what was needed was one set of credible benchmarks and measures that could be used to demonstrate that we have achieved at least minimum acceptable standards and that moving in the right direction," continues McDougall. "BSI was able to provide Sun Life Direct with credible endorsement of the organisation's commitment to more sustainable business practice through independent third party certification."

For further information on the PAS 2020 assessment and certification scheme please visit www.bsigroup.co.uk/pas2020 or call **0845 080 9000**.

BSI

PO Box 9000 T: +44 (0)845 080 9000
Milton Keynes F: +44 (0)1908 228 180
MK14 6WT E: certification.sales@bsigroup.com
United Kingdom www.bsigroup.co.uk/improve



The BSI certification mark can be used on your stationery, literature and vehicles when you have successfully achieved certification.

