



# PHEAA Powers a Digital-First Approach With Smart Communications

When it comes to the financial services industry, 67 percent of customers feel that their preferred methods of communication aren't always being taken into consideration.<sup>1</sup> Prioritizing digital transformation is no longer an option, it's a must for companies looking to gain a competitive edge in today's customer-driven age. One of the leading student aid organizations in the U.S. is keenly paving the way for the financial services industry after tapping Smart Communications to drive its digital transformation journey, kicking the organization's efforts into high gear and powering nearly 600 million communications annually.

Meet PHEAA



Founded in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has grown to be one of the top providers of student financial aid services in the U.S. PHEAA now serves millions of students and thousands of schools across the nation through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

PHEAA dedicates earnings to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs. PHEAA continues to devote its energy, resources, and imagination to developing innovative ways to ease the financial burden of higher education for students, families, schools, and taxpayers. Since opening its doors over fifty years ago, PHEAA has served millions of aspiring students and awarded more than \$11 billion in grants and aid.

## Leaving Legacy Systems Behind

In 2014 PHEAA came face-to-face with a decision that would likely be the company's biggest customer-focused one to date – parting ways with an aging, cost-burdening legacy customer communications management (CCM) system.

Over the years, PHEAA had accumulated a tremendous number of templates, and keeping them updated was a time-consuming process. PHEAA needed a way to scale their communications – that's where Smart Communications came into play.



**Smart Communications' cloud-based solution has allowed us to scale our business at the level and agility we need, while lowering our cost of ownership and keeping sensitive data safely stored behind our firewall.**

– Kate Pocalyko, Communications Platform Product Owner at PHEAA



## *Simplifying Communications, the SMART Way*

In 2016 PHEAA launched its digital communication transformation journey with Smart Communications and has since successfully created an entirely new communications platform. Through careful collaboration between key stakeholders across PHEAA, its clients, and the Smart Communications Professional Services team, the team has reduced the total number of templates by 50 percent.

“Smart Communications’ cloud-based solution has allowed us to scale our business at the level and agility we need, while lowering our cost of ownership and keeping sensitive data safely stored behind our firewall,” said Kate Pocalyko, Communications Platform Product Owner at PHEAA. “We are now better positioned to scale our business and communicate with our customers more effectively and efficiently.”

With the reduction of maintenance costs and the reduction of physical equipment, PHEAA has achieved a total cost savings of \$2.5 million since migrating to Smart Communications.

Smart Communications’ Draft Editor functionality has introduced an ease to maintaining content across multiple templates and has drastically improved the internal user experience for PHEAA’s customer support team. “Smart Communications makes it as easy as using a standard word processor to make a simple content change,” said Kate. The product

intelligently highlights changes and edits in a document, allowing rapid review and instant approval. “Our customer service representatives don’t have to know code or conditional logic to make necessary updates to templates now,” added Kate. With Smart Communications, data is captured in real-time for business with the visibility needed to cross-check key data points.

## *Lessons Learned Along the Way*

Key to any successful journey are the lessons learned along the way. “Onsite workshops really helped us,” said Kate, “We found that face-to-face interaction, communicating and learning directly from each other was the most helpful.” When it comes to digital transformation, it’s important to consider scope and perform an upfront analysis of which communications are being sent most often, how existing templates are being used, and the data that’s being used. PHEAA was able to slim the organization’s scope of work by dividing templates into subject matter and high-priority topics that required the most significant changes. Focusing on these needs and developing them into business requirements reduced costs and resources, while creating the wins to inspire continued improvements in PHEAA’s commitment to customer conversations.

### *Feeling Inspired by PHEAA’s Story?*

Let us show you how more modern customer communications platforms and programs can be a game changer for your business. Contact us at [requests@smartcommunications.com](mailto:requests@smartcommunications.com).

## Connect With Us



1. “Smart Communications Study: Are Customer Communications Getting SMARTer?” published June 21, 2019, by Smart Communications:  
<https://www.smartcommunications.com/benchmark-study-2019/>

Smart Communications™ is the only provider of a cloud-based, next-generation customer communications platform. More than 500 global brands rely on Smart Communications to deliver meaningful customer communications across the entire lifecycle — empowering them to succeed in today’s digital-focused, customer-driven world while also simplifying processes and operating more efficiently. This is what it means to scale the conversation. Smart Communications is headquartered in the UK and serves its customers from offices located across North America, Europe, and Asia Pacific. The company offers a range of solutions including SmartCOMM™, SmartCOMM™ for Salesforce and SmartDX™. In July 2019, the company acquired global digital transformation software company, Intelledox to further enhance its leadership in customer experience-driven communications. To learn more, visit [smartcommunications.com](http://smartcommunications.com).