

Case study: Royal Mail business-to-business invoices

Client

Royal Mail

Date the work was carried out

March 2001 – February 2002

Royal Mail implemented the redesign in July 2003

The brief and our approach

Royal Mail had identified the need to improve the layout and appearance of its business-to-business invoices. Boag Associates helped develop a business case for a user-led redesign that would both improve Royal Mail's brand expression and help meet key business objectives.

Our research resulted in us redefining the brief and establishing key performance indicators. We devised an approach to obtaining customer feedback that allowed us to ensure that our designs met the needs of as many customers as possible whilst working within strict budgetary and accounting system constraints.

Our proposed solutions achieved significant design improvements without recourse to reprogramming Royal Mail's accounting systems.

Our process involved careful logging of all stakeholder input: this resulted in our achieving a high-level overview, leading to proposals for further related opportunities.

Results achieved

Our measures of success included:

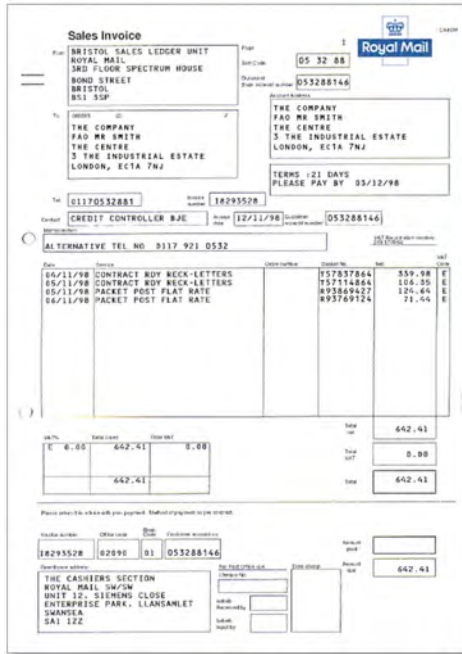
- Speed of processing and payment by customers
- Volume of invoice-related calls to the helpline (savings of £120,000 in operational costs over 12 months post introduction)
- Customer satisfaction with Royal Mail invoicing improved from around 60% to over 80%.

Client's remarks

'The team from Boag Associates demonstrated high levels of commitment and diligence during the process of re-designing Royal Mail's invoice to business customers. The agency was rigorous in its approach to researching the full range of information design issues before generating a solution. The testing procedure they used was exemplary. The project required the assimilation of a high level of technical detail and the agency swiftly acquired a working knowledge of Royal Mail systems and processes which enabled it to design the best solution for us.'

Susan Lewis, Senior Brand Strategy Manager

Before



During our analysis and observation stages, we identified the following key issues that needed to be addressed:

- 1 Entries (listing the products and services that customers had used) did not provide enough detail for accounts departments to process the invoices efficiently.
- 2 Payment slip details were unclear and were repeated on every page.
- 3 There was no clear delineation between different invoice types, credit notes, or statements for different kinds of accounts held by customers.
- 4 The previous invoice held no background information on how to pay. There was no clear helpline or support telephone number or web address, and no information on how to change payment method or raise a complaint. Boag Associates therefore developed background and explanatory information which was accredited by the Plain Language Commission.

After

