

Quilter

HOW QUILTER USE SITEMORSE TO SUPPORT A DIGITAL CENTRE OF EXCELLENCE

Client case study

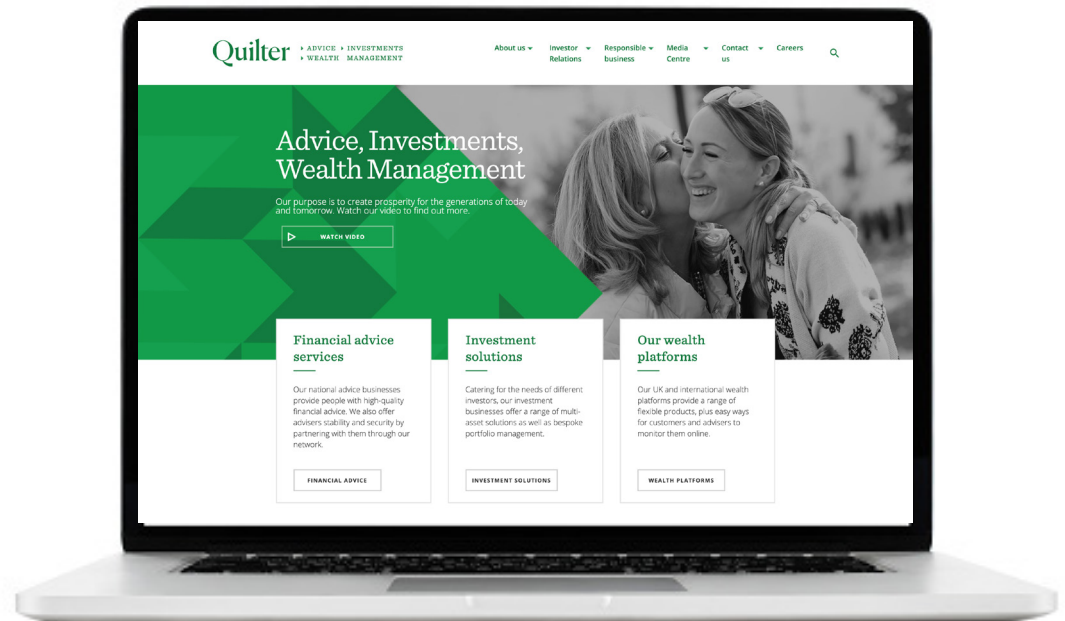
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ABOUT QUILTER

Quilter plc is a financial services company based in the UK that is listed on the London Stock Exchange. It is a leading provider of advice, investments, and wealth management both in the UK and internationally.



SETTING UP A DIGITAL CENTRE OF EXCELLENCE

With Quilter serving around 900,000 customers, the company's digital touchpoints are extremely important. Quilter operates a variety of websites and additional digital channels that customers need to authenticate into.

These channels need to operate to the highest standards to meet customer expectations, but also to ensure that the various regulatory compliance commitments that a listed financial services company needs to meet are met. This compliance covers elements such as digital accessibility and ensuring services are described in the correct way.

To help underpin a consistent and high-quality user experience across its entire digital estate, the company set up a Digital Centre of Excellence. Here, a team of twelve ensure that digital channels drive the best experience possible but also focus on areas such as SEO and improving accessibility. Most of Quilter's digital channels are based on the Episerver Content Management System (CMS) although a couple of other CMSs are also used (Alfresco and Elemento).

900,000

Quilter customers

12

person team to ensure the best experience possible

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HOW SITEMORSE SUPPORTS THE DIGITAL CENTRE OF EXCELLENCE

The Centre of Excellence operates a number of tools to support its core mission of achieving and maintaining high standards across a complex and constantly evolving digital footprint. One of these is Sitemorse.

“Sitemorse is one of the key tools that we use every week across our websites and customer extranets to help drive improvement and to work towards AA compliance with the WCAG 2.1 accessibility guidelines.”

Martin Parker
Head of user experience, Quilter



Martin Parker is a long-term advocate of Sitemorse having used it extensively over a decade earlier at a public sector organisation. He comments, “Sitemorse is pretty unique because it is rare to get so many capabilities packed into one tool and have something that is so easy to use.”

At Quilter, the team leverage Sitemorse’s automation to carry out tasks which are not feasible to carry out manually. Martin Parker explains, “Improving accessibility and keeping on top of elements such as broken links can be really time-consuming. We operate over ten websites and four gated customer channels, and automation plays an important part in ensuring we keep to high standards. Sitemorse has been priceless really because we simply don’t have time to do everything manually.”

USING SITEMORSE IN WEBSITE DEVELOPMENT AND ON LIVE CONTENT

Sitemorse tends to get used in two different ways: firstly, in development projects to ensure compliance, and then on a weekly basis to ensure standards are maintained.

Martin Parker explains, “We use Sitemorse in our development cycle for new websites to test for accessibility and any coding issues. We will carry out testing on our staging server and then use the results to inform our issue backlog. We then test and retest before we go live, and once again in the live environment. We want to make sure we drive the best user experience possible.” This approach ensures that both code and content are fully tested as a site goes live.

Once a site goes live then it is subject to the weekly testing that helps to spot issues that can be fixed. “We measure for accessibility, SEO, performance, code quality, spelling mistakes, broken links and more. We run a weekly report and then work out the priority fixes to focus on based on what Sitemorse has found.”

The team also leverage Sitemorse’s built-in intelligence prioritisation to assign fixes across the team to the people best equipped to remedy an issue, some of which may result in being submitted as tickets into Jira. Once assigned, these issues are then worked upon.

When it comes to actually remedying an issue, other Sitemorse features such as explanatory videos which go through what an issue is, why it is important and the fix required, put actions in context and have proved invaluable in making staff more knowledgeable on topics such as accessibility.



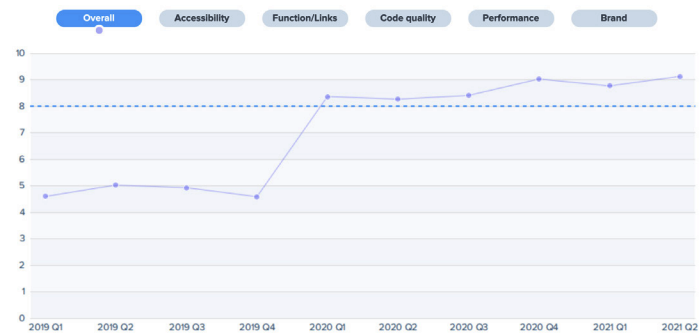
USING THE INDEX TO BENCHMARK WEBSITE QUALITY

Another critical feature for the teams has been the use of Sitemorse’s INDEX service: a quarterly website benchmark that shows Quilter’s progress compared to other UK listed companies, creating tables based on an aggregated score of various components of Sitemorse’s automated assessment.

In the Q2 2021 INDEX for UK London-listed PLCs, Quilter PLC was ranked second among 427 companies ranked in the sector. This represents a huge improvement since the first quarter of 2020; in Q4 2019 Quilter PLC was only ranked number 174. Over the period Quilter’s overall score has gone up from 4.6 to 9.1.

Martin Parker comments “It’s been great to see our website improving and get confirmation that the approaches we’re taking are making a real difference. Being able to measure success also certainly keeps us wanting to improve and keeps us on our toes! Sitemorse identifies the specific areas where we need to focus on.”

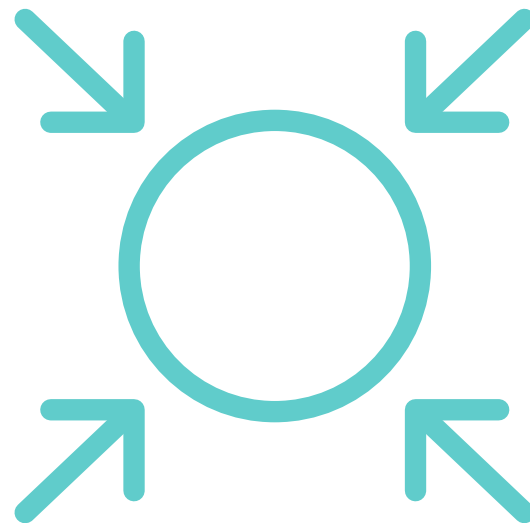
The improvements in scores also give senior stakeholders within Quilter confidence about the Digital Centre of Excellence, as they can see positive improvements for the website.



IMPROVING ACCESSIBILITY

One area where there has been significant progress is in improving accessibility. "This is a critical area for us" admits Martin Parker. "We need to ensure we are always working as hard as we can towards compliance from both a legal and regulatory standpoint. We do get audited on this. Accessibility is also critical to ensure we provide the best possible experience for all our customers. There are thirteen million people registered disabled in the UK. Every customer is important to us."

Using Sitemorse to improve accessibility has also helped raise awareness of the issues across the business, and it is seen as increasingly important by senior management.



THE FUTURE

Martin Parker and his team plan to continue to use Sitemorse to drive compliance and improvement, while also maintaining the standards achieved to date. “We still have a backlog of issues to work through, and we also plan to focus on improving some other channels, especially our targeted portals that our customers log into.” The team also plan to investigate more of Sitemorse’s capabilities.

“We’re very proud that Sitemorse has played a significant role in the improvements made to Quilter’s digital estate. Creating a Digital Centre of Excellence shows Quilter’s commitment to usability, accessibility and customer experience and has resulted in very tangible results.

Their rise in the quarterly INDEX for UK listed companies to the number one spot is exceptional and a leading example for others to follow. Congratulations to Martin and the team on their significant achievement.”

Lawrence Shaw
Sitemorse Founder and CEO





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