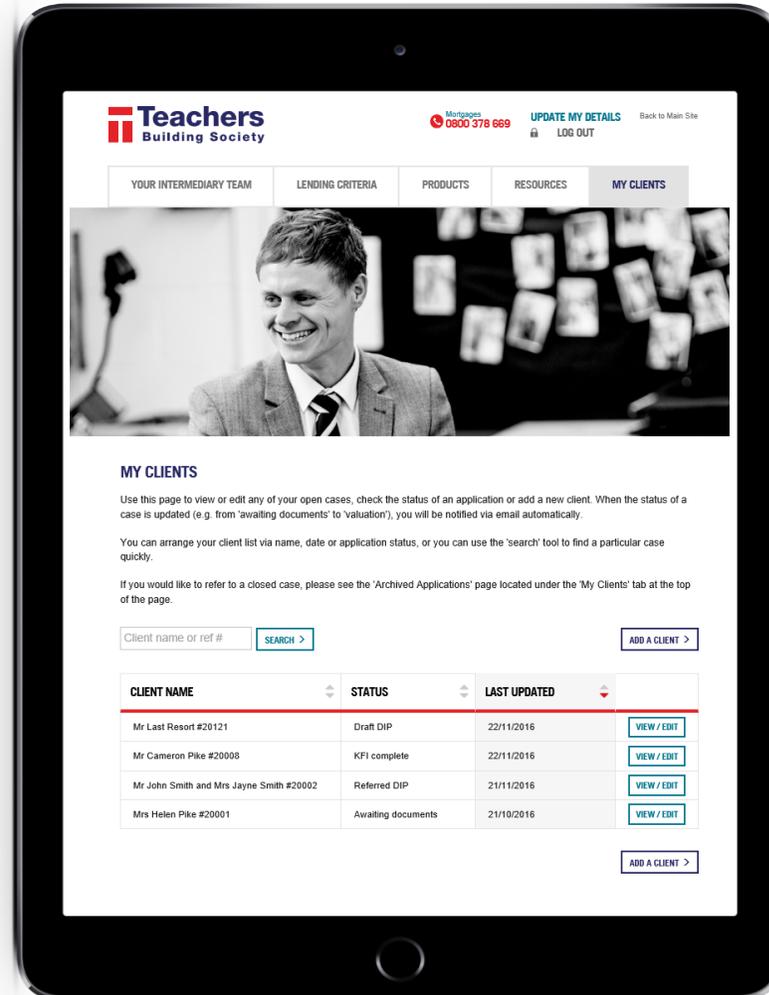
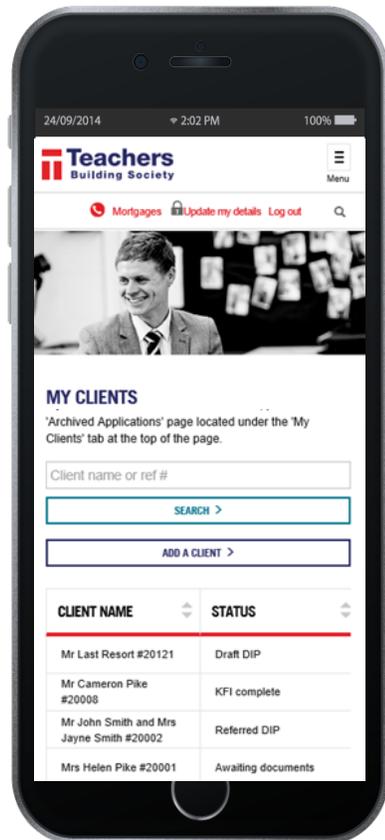


Teachers Building Society Portal Case Study



Teachers Building Society - Intermediary Portal

Mortgage
Finance
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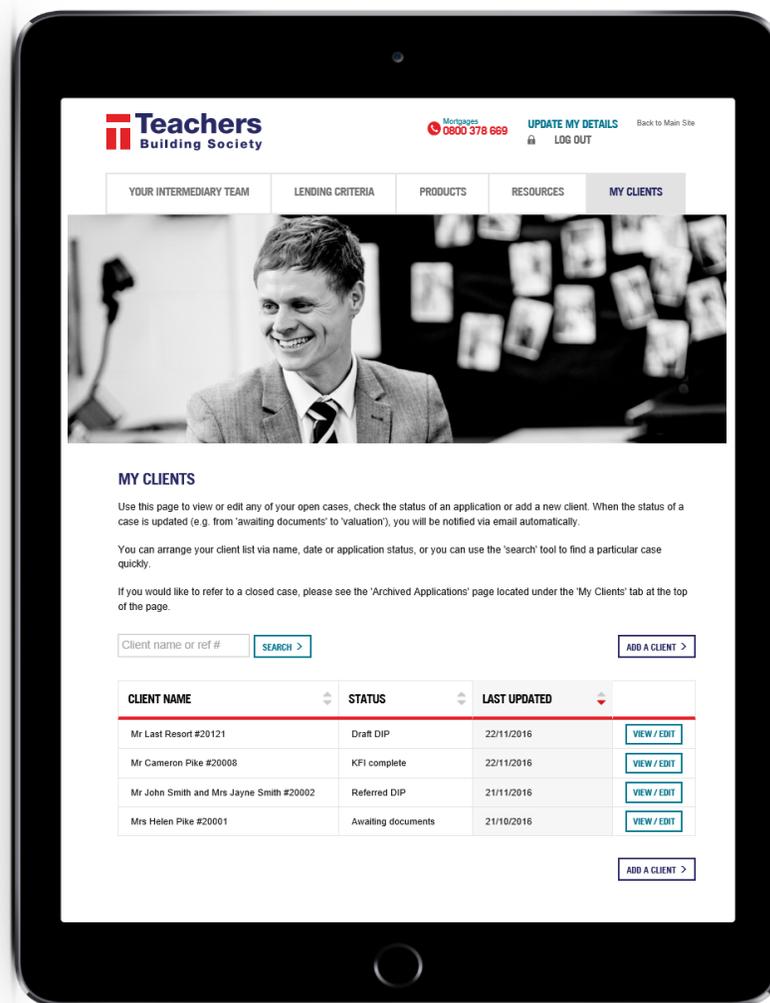
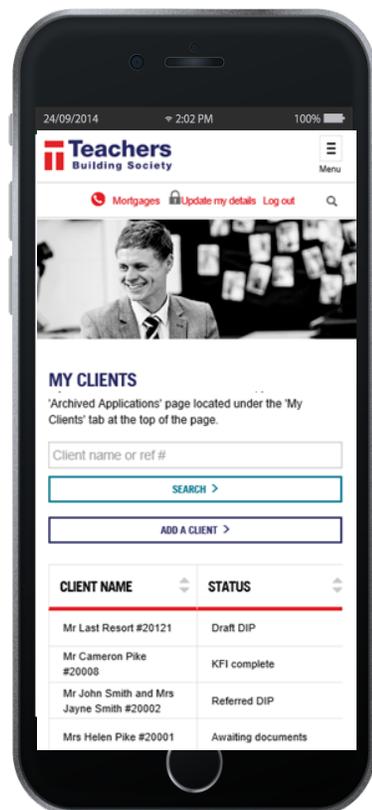
Appius also developed an intermediary portal for TBS in Sitefinity. This was a complex integration project that allowed them to take control of the end to end application process for brokers, in a way that other regional societies using off the shelf products cannot.

The portal allows brokers to:

- Securely sign on and upload all secure documents
- Complete online applications
- Manage multiple applications from their account dashboard
- Be notified when an application status changes or requires input
- Dynamically generates customer specific KFI documentation so this can be printed and immediately signed
- The project was delivered to time and budget

Teachers Building Society - Intermediary Portal

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Ian Pullen - Service Delivery Manager – Teachers Building Society

"Far too often you get a load of polish and promises at the start of a project that all too often evaporate as time goes on, particularly if the going gets a little tough. But that's not the case with you guys and I can't tell you how much all of us involved with this at Teachers Building Society appreciate and respect how you have gone about this from start to finish. What has been achieved and the manner in which it has been delivered is I think a testament to your professionalism, unwavering commitment and the fact that you are just great people to work with."

Joanne Atkin, Group Editor of [Mortgage Finance Gazette](#), said:

"The judges complimented Teachers Building Society for creating an online portal to make the mortgage application process smoother for intermediaries.

"Everything the broker needs is online and with the society's range of specialist mortgages for the teaching profession, it's imperative that brokers can access all the information they need as easily and quickly as possible."

UX design for self service journeys

Update my details Log out

Your Intermediary Team | Landing Criteria | Products | Resources | My Clients

Teachers Building Society

Mortgages - 0800 378 669 BACK TO MAIN SITE

Mr John Smith #20151 Delete client >

STATUS: **KFI COMPLETE**

Updated 10/07/2017

CONTACT DETAILS
Allenview House,
Wimbome,
Dorset,
BH21 1AG

Update contact details >

DECISION IN PRINCIPLE
Approved 10/07/2017 View Summary

As a <user group> I want <requirement description> so that <user objective>

For example, **as a news editor I want to backdate articles so that they don't all appear to have been published on the date of the migration.**

- Approach UX for a 'self service tool' with complex data capture and process flow based logic
- Iterative approach working with available API
- UX testing at prototype stage, between iterations and to validate road map ideas if desirable
- Take into account varied levels of user understanding, priorities and key persona based criteria
- Consider additional value of demos, educational and support elements
- Particular care needed in relation to overlap with other channels, systems and offline processes

Application Documents

DOCUMENT TITLE
Key Facts Illustration
Approved DIP
Approved DIP

WELCOME SCREEN (FOR BROKERS)

CLIENT VIEW (FOR BROKERS)

APPLICATION LIST (FOR ADMINS)

APPLICATION VIEW (FOR ADMINS)

appius

Transforming Digital Experiences

About us

- 1.8 million turnover
- Established for 22 years
- 25 employees all in-house
- Umbraco, Episerver, Sitecore, Progress Sitefinity partners
- Clients across Charity, Finance, Professional Services, Healthcare, Transport, Membership and Travel & Leisure sectors
- Global customer base driven by sector and platform expertise



To Find Out More

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