



**Name Genie**

Your Digital Name Change Service

# Name Genie

COMPANY & ORGANISATION INFORMATION PACK

OCTOBER 2020

# Name Genie is being developed to save companies and individuals time associated with the simple task of updating their name after a life event

- ▶ Our research has shown that it takes ~40 hours to update your name with companies and organisations in Australia after a life event such as a marriage or divorce
- ▶ Consumers find the process frustrating and time consuming and want a safe, secure way to automate the process of updating their basic details
- ▶ The process of updating basic customer details is non-value adding for organisations and companies and adds administrative costs and overheads
- ▶ Our new Digital Name Genie will provide a digital platform to enable individuals to provide their updated details to Australian organisations efficiently and securely
- ▶ This service will be free to organisations to leverage and provide a digital channel to receive the information and supporting documentation needed to update your customer records
- ▶ Participating organisations will eliminate non-value adding activities, reduce paper based forms, enable employees to focus on value adding activities and increase customer satisfaction levels

# In 2020 we conducted consumer research on the experience of updating personal details after a life event

- ▶ Some of the findings show:
  - ▶ 75% of respondents either have changed, or will change their name as a result of marriage or divorce
  - ▶ Respondents rated the experience as 4/10 and described the experience as “frustrating” and “boring”
  - ▶ On average, it took respondents 40 hours of effort to change their name, with some taking as much as 96 hours to complete the process
  - ▶ When asked to rate the efficiency of the name change process with Australian organisations on a scale of 1-5, the average response was 2/5
  - ▶ 100% of respondents said they would use a digital service if it was available
  - ▶ 9/10 respondents would recommend this service to a friend

*“Awesome, I wish this was available when I got married. The effort in changing names disproportionately disadvantages women not only in effort but financially in the cost of having their documents updated. Streamlining this process is gods work in helping advance equality for women.”*

*“I wish this was in place when I changed my name!”*

*“Sounds like a good idea. Saving time and frustration going through the process.”*

*“Great, anything that saves time and is automated would be very helpful”*

# Name Genie is a multi-party platform, enabling secure online information exchange between individuals and organisations

- ▶ Individuals will register on the platform and will be required to securely authenticate their identity using a 3<sup>rd</sup> party identity verification provider
- ▶ Individuals will complete their details and provide copies of their supporting documentation, such as marriage or divorce certificates, drivers licenses etc.
- ▶ Individuals will then select the organisations which they wish to update their details with and the platform will submit the information electronically to each organisation
- ▶ Organisations will receive the information and supporting documents electronically and can follow existing internal processes and systems to update customer records.
- ▶ Employees from each organisation are able to update the status of each request in their organisation dashboard on the platform.
- ▶ The status is then automatically available for individuals to view in their dashboard on the platform, reducing any unnecessary follow up calls and requests to organisation customer contact centres

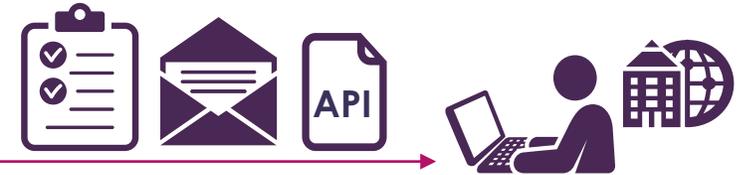
# Organisations can determine how they would like to receive information from the platform when setting up the organisation profile



**Individuals** will register on the platform, verify their identify through Digital ID, provide ID and supporting documentation and select the organisations they wish to update their name and personal details with. Users can then submit their name change applications directly through the platform.



**3<sup>rd</sup> Party ID Verification** through Digital ID and Australia Post is a key feature of the platform to ensure individual are securely verified during the registration process to eliminate the risk of identity fraud.



**Organisations** register on the platform and identify the information required to facilitate updating customer details (e.g. ID documents, supporting documentation, account/membership number etc.).

Organisations can also select how information is shared with them (e.g. email, API etc.) and registered users can access the system directly to manage customer name change requests within the platform.

# Organisations will have a choice in how they would like to receive information from the platform



**1 Direct Platform Access:** This is the simplest and easiest way for organisations to get started. Once the organisation has been registered and onboarded, employees from your organisation will be able to login and view the name change requests which have been received from customers. Documentation will be available to view securely on the platform for the purpose of processing a request, this eliminates the need for your organisation to handle and store customer ID documentation and reduces your cyber security risk



**2 Platform Generated Email:** This option will generate an email from our servers using a standard form which contains the information and supporting documentation necessary to update the users details with your organisation. During the organisation onboarding process, organisations will define the information and supporting documentation required. Users will authorise the email to be sent on their behalf within the platform along with the supporting documentation required by your organisation.



**3 Bulk Export:** This feature will enable a bulk export of customer requests to be generated and the required information exported into a CSV file. This feature will be accessible by authorised users within the platform.



**4 API:** An API will be made available for onboarded organisations to receive customer information directly through an API. This feature is part of the development roadmap and will be made available by request during initial stages of development. This feature would suit organisations wishing to integrate the updates directly into their existing customer databases / CRM systems without any employee interaction. This will require IT resources and investment from the organisation to integrate the API into existing systems, however this feature will provide significant manual effort and cost/time saving.

# There is no cost to companies and organisations to use this service

- ▶ The success of this service is based on having as many Australian companies and organisations on the platform as possible to maximise the individual user experience
- ▶ There is no cost for organisations to utilise this service, all that is required is for a profile to be created and to provide us some basic information about the documentation and information which you require in order to update a customer's records
- ▶ There is no requirement to change your existing processes, this can be deployed in parallel with existing processes and your organisation can begin benefitting immediately
- ▶ The only requirement we have from organisations is an agreement to accept and process applications provided through the platform
- ▶ In order to facilitate the digital exchange of information, we will provide the information and documents each organisation requires and provide that directly to you through the platform

# This service saves time and money for individuals and companies and will benefit the overall Australian economy

## Individual Benefits

- ▶ Simplifies process, removes ambiguity and complexity
- ▶ Saves on average 40 hours of time<sup>1</sup> and between \$1,600 - \$2,500 of lost income / productivity<sup>2</sup>
- ▶ Empowers individuals to manage the process themselves using technology, reduces unnecessary steps, eliminates repetitive processes where possible

## Organisation Benefits

- ▶ Reduces administrative cost for businesses, enabling employees to focus on more value adding activities
- ▶ Reduces internal post handling activities and paper waste/recycling costs
- ▶ Reduces process/task completion time by eliminating the need to transcribe from paper forms to electronic systems
- ▶ Reduces risk of data entry errors

## Economic & Societal Benefits

- ▶ Reduces paper volumes and waste/recycling costs
- ▶ Reduces postage volumes by up to 3 million letters per year
- ▶ Reduces up to \$122m worth of time spent on name changing activities each year, enhancing economic output and/or time spent on family and community activities

# Next steps and how to get started

- ▶ The consumer launch of the platform is planned for January 2021. We are looking to get organisations registered and setup by the end of November 2020
- ▶ The first step is to register interest and have a short call with our team to discuss the platform and your organisation requirements in more detail and then register your organisation
- ▶ There is a simple registration and profile setup process where you can provide your organisations specific details, documentation requirements, contact details etc.
- ▶ Once the profile has been setup, we will validate the setup to ensure we have all the necessary information and then enable your profile
- ▶ If you have any questions prior to this or during the registration process, we will be more than happy to help
- ▶ Please send an email to [info@namegenie.com.au](mailto:info@namegenie.com.au) to setup time to talk to one of the Name Genie team