



Customer Success Stories

# How Sun Life Uses VisibleThread to Communicate Clearly across the Enterprise

6,000 users at Sun Life score business content every day to support its' brand goals of being "optimistic, authentic, confident, caring and dynamic".

Head Quarters  
Toronto, Canada

Size of Company  
50,000 employees

Industry  
Financial Services

[VisibleThread.com](https://www.VisibleThread.com)



## About Sun Life

Sun Life is a leading financial services company and is listed on the global Fortune 500. They help their clients achieve lifetime financial security and live healthier lives. They serve millions in Canada, the U.S., Asia, the U.K. and other parts of the world.

Sun Life offers protection and wealth products and services. These include Insurance, Investments, Advice and Asset Management. They also provide health programs and related initiatives. Examples include health-screening clinics, workplace peer-support programs and disease-prevention programs.



## Background

'Optimistic,' 'authentic,' 'confident,' 'caring' and 'dynamic'. These are Sun Life's brand goals. In an industry often known for its jargon and complexity, using clear or "plain language" sets Sun Life apart from its peers.

**"Our goal is to create a brand that is both sophisticated and accessible. One that's authentic, caring, confident, and dynamic. Our brand is built on a foundation that includes helping clients achieve lifetime financial security and live healthier lives. How plain language plays into that is really supporting our verbal identity."**

- Marianne Arnaudon, Assistant Vice President of Global Brand & Marketing, [Sun Life](#)

Sun Life has been using VisibleThread's VT Writer / VT Insights solution since 2018. 6,000 Sun Life employees across 53 teams now use the product every day to score and optimize content. From Linguistic Services to Disability Solutions, Media & PR to Legal, Compliance to Operations, VisibleThread helps teams produce clear, consistent and on-brand content.



# The Challenges

Here are some of the challenges that prompted Sun Life to originally adopt VisibleThread.

## 1. Clients struggle to understand technical language and jargon

Sun Life operates in the highly complex regulated financial services sector. As a result, a lot of the documentation is technical and dense with financial terminology. For the communications teams, their goal is to help demystify this content and help their clients understand Sun Life's offerings. The challenge here was how to bridge the gap between complex products and clients who are not financial experts. Ultimately client experience suffers with non-transparent and overly complex content.

**“If you think about somebody who is unable to work due to their health, that’s a scary challenging time. Not only in terms of their physical or mental health but also financially. They need to understand what they need to do, how to submit a claim, and understand the decisions made on claims. Those are all really important drivers for us to make sure our communications are clear.”**

- Heather Anderson, Disability Solutions Manager, [Sun Life](#)

## 2. People write in different ways, hard to achieve one brand voice

In an enterprise setting like Sun Life, thousands of people create written content. The variation in writing styles is wide. And many people writing content are experts in legal and compliance but are not professional writers. Sun Life needed some way to benchmark quality in an objective way at scale, to create unity in their messaging company-wide.

## 3. A need for automation - using purely manual review methods too costly

With the sheer volume of content, having brand and communication colleagues review everything for “plain language” prior to going out the door was impractical. Sun Life needed an automated solution to complement manual reviews and alleviate bottlenecks. They also wanted individual writers to score their own content at source, while also tracking the metrics company wide. This would provide meaningful visibility and metrics across the enterprise. Finally, they wanted to track improvement during editing cycles, as this would allow them to reward good performance and over time lead to better writing across the board.



# The Solution

In 2018, Sun Life chose VisibleThread to help automate content checking.

They launched a 6-month paid pilot of the software. Representatives from key teams within the organization participated. VisibleThread used a POV (Proof of Value) type of engagement. POVs aim to quantify the business benefit by tracking actual usage, and efficiency / quality benefits during the pilot.

As well as providing software licenses, POVs involve a services component. VisibleThread staffed the pilot with a senior member of the VisibleThread CS (Customer Success) team to help adoption and training. In this case, it was Angus McDonogh.

**“With a large organization like Sun Life, a key success factor is good engagement from users, along with executive sponsorship. In Sun Life’s case, their leadership support was strong. This makes my job so much easier.”**

- Angus McDonogh, Customer Success Program Manager, [VisibleThread](#)

Angus worked alongside participants to make sure that the solution was solving their challenges. At the end of the 6-month POV pilot, they assessed the benefits and ROI (Return on Investment). With strong ROI showing efficiency and quality improvements, Sun Life signed a 3-year agreement to roll out VisibleThread enterprise-wide.

**“I actually look forward to speaking to Angus and his colleagues from VisibleThread. We always have very educational and fun conversations!”**

- Paul Moser, Senior Writer, Media and PR Specialist, [Sun Life](#)



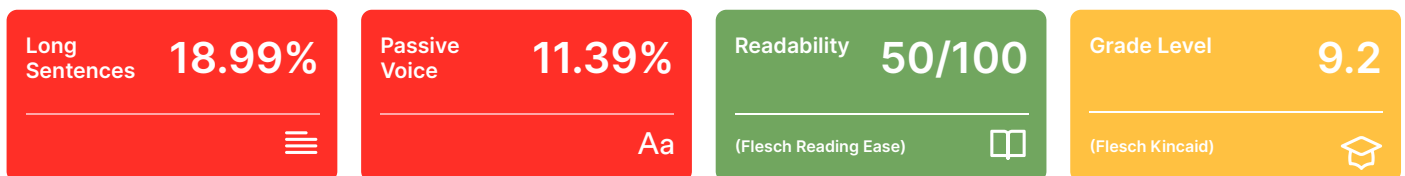
### Alongside, the positive ROI, these additional factors also helped the decision:

- The level of engagement for all participants during the pilot was high. And in surveys users indicated they found it very easy to use. This allayed any fear of “shelf-ware”,
- The ability to deploy the software behind Sun Life’s firewall onto internal servers was very important. This was due to the sensitive nature of much of the content including PII (Personally Identifiable Information) data,
- VT Writer’s ability to score both English and French language content was decisive as much of Sun Life’s Canadian content is French, and
- Executive level dashboards and reports using VT Insights\* provided leadership with visibility and KPIs (Key Performance Indicators) across teams of writers.

\* The VT Insights module sits on top of VT Writer and gives a birds-eye view of the quality metrics across all teams.

Once the rollout commenced, the VisibleThread CS team led by Angus conducted clear writing workshops with the wider user population. Angus worked hand in hand with the Sun Life program manager to help outline the value of clear language for the brand across multiple teams. Team participation grew each year.

After a successful 3-year rollout, Sun Life extended the original contract by another 3 years. As of 2023, 6,000 Sun Life employees across 53 teams use VT Writer every day to score and optimize business critical content.



## 1. The “traffic lights” scorecard system helps us focus on the right areas

VT Writer uses a red-amber-green traffic light “feedback loop” to score all content. It gives a quick, intuitive sense of content quality. This applies both at the document and paragraph level. Users found this “traffic light” scoring highly effective.

**“VT Writer’s red-amber-green traffic light scorecard means you can see right away whether it’s easy to read or whether you have opportunities to improve.”**

- Heather Anderson, Disability Solutions Manager, [Sun Life](#)



## 2. Improves Writing Style

Jillian Stinson is a Copywriting Manager who oversees the insurance marketing team at Sun Life. They focus on writing business-to-business (B2B) communications and marketing to independent insurance advisors. As well as managing, Jillian also does a lot of content writing and editing.

But even as a professional writer, Jillian found VT Writer helped her own writing style.

**“I didn’t realize how often I was writing with passive voice until I had VisibleThread. It helps me focus on improving that, and helping my team improve their writing.”**

- Jillian Stinson, Copywriting Manager, Insurance Marketing Team, [Sun Life](#)

## 3. Gamification of VT Writer promotes team buy-in

With VT Writer, you explicitly tell it when to score content. This means you can work on your outline and first draft without interruption. Then “polish” it when you’re ready. By putting the power of when to analyze in the user’s hands, the software can track improvement as content moves from draft to final version.

You clearly see how your edits improve the readability scores. In fact, making changes to improve readability has become something of a sport in Sun Life.

**“It’s kind of a game. If you analyze some text, and you get a certain readability score, you’re motivated to try get a better score. It brings competition between colleagues to see how high you can go!”**

- Paul Moser, Senior Writer, Media and PR Specialist, [Sun Life](#)

Not only is the gamification aspect helping the team become better writers, but they also enjoy the process. Nothing promotes team buy-in quite like a healthy dose of competition, even with yourself.



# The Impact

## 1. Improved Client Experience with Clearer Messaging

Once VT Writer became part of the editing process, client experience and internal efficiency improved. User testing has shown a positive impact.

**“In addition to using VisibleThread as a tool in our writing process we also test our content with panels. Through user testing, our clients reported feeling valued and that the content is more sensitive to their needs. They’ve also acknowledged the clarity and the simplicity of our messaging.”**

- **Andrea Davis**, Manager of Client Content, [Sun Life](#)

Throughout Sun Life, writers are producing better material that is clearer and easier to understand. Senior Writer, Media and PR Specialist Paul Moser reviews material that is client facing, advisor facing, and public facing. He notes that when the writers use VT Writer from the outset, it results in better content.

These documents can be complex contracts for life insurance policies and are of the utmost importance for Paul’s team.

**“When we have our writers use VisibleThread before they send it to the review process it’s fantastic. We know we’re already starting from a good point of clear writing, with a jargon-free rating... If they sign a contract for a life insurance policy, we want them to know exactly what they’re purchasing.”**

- **Paul Moser**, Senior Writer, Media and PR Specialist, [Sun Life](#)



## 2. Operational Cost Reduction – 19% fewer help desk calls

As part of effectiveness tests, Sun Life re-wrote 11 specific letters of correspondence templates based on guidance from VT Writer. The impact was stark. The result was 19% fewer help desk calls, and a 23% reduction in inbound clarification queries.

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## 3. Publication Review Process – Creating a standard for approval

Paul Moser refers to VT Writer as a standard of approval for their Publication Review Process. Prior to submitting a draft for review, writers must score a minimum of “Green” on readability. This has saved time, increased productivity, and ultimately produces a more successful publication.

## 4. Consistent tone across multiple teams with objective metrics

When Sun Life is communicating with clients, there are a lot of stakeholders at play. Many of these are experts in their field, and they have various opinions. Quite often, there is no right or wrong answer, but there does need to be unity throughout the messaging. Now, with every paragraph scored for “grade level” and readability, it takes the heat out of the discussion.

**“I find VisibleThread provides me with a neutral look at my work. There is no judgment. The scores speak for themselves. That pushes me to think outside the box in order to improve the readability.”**

- Madeline Maltais, Linguistic Services Manager, [Sun Life](#)

VisibleThread’s ability to record content improvement allows departments to track progress over time. It brings an opportunity to see how their writing has improved. Not only is the feedback instant, it’s also objective.

**“It’s just really a fantastic tool. Not only does it improve a specific document, but it also retrains the way you think about your communication. What I’ve seen over time is that as you use the tool, the feedback it gives you builds on itself.”**

- Heather Anderson, Disability Solutions Manager, [Sun Life](#)





## 5. Measurement and growth across the organization

Using VT Insights and VT Writer combined, Sun Life has full enterprise visibility. In a recent annual review, over 70,000 documents were analyzed, and they met or exceeded target goals in the areas of grade level and readability. This organizational objective view allows the Sun Life team to analyze cross-functionally and compare US and Canadian performance. Being able to dissect this information easily from VT Insights allows them to highlight success and find areas for future improvement and growth. Having the data allows Corporate Communications and Executives to raise awareness at key moments.



## Conclusion

Having proven the business value of VisibleThread against its brand goals, Sun Life have been using VisibleThread for over 5 years. Expanding from an initial pilot to a user community of 6,000 across 53 teams.

The success of this project has shown how large enterprises can use automation to help address the thorny challenges of trying to have an accessible, consistent message across different internal teams.

**“It makes me a more confident writer. I would recommend it to all types of organizations, people, and individuals. It’s not just for copywriters and marketers, it’s for everyday users.”**

- Jillian Stinson, Copywriting Manager



# Want to know how VisibleThread can transform how you communicate?

Contact Us

**Need help or  
have a question?**



Talk to us by mailing [info@VisibleThread.com](mailto:info@VisibleThread.com)  
to find out more about the core capabilities  
of VT Writer