

## Client feedback leads to referrals for Helm Godfrey

In difficult economic times and in light of impending changes to the regulatory landscape, defining a strong service proposition has never been more important. Leading financial planning firm Helm Godfrey successfully encourage client feedback to ensure that their proposition continues to deliver the outcomes their clients demand.

Helm Godfrey Partners Ltd is one of the most successful firms of independent financial advisers in the UK. With an advice and financial planning approach based on having a thorough understanding of what their clients want them to achieve, Helm Godfrey actively encourage feedback on all aspects of their business. Implementing The Customer Feedback Centre has helped them formalise and simplify the process of gathering feedback in order that they can focus on using the results to ensure that clients remain confident in the service and advice given, and that they can continually adapt to their clients changing needs and wants.

### The Challenge

As a successful financial planning practice, Helm Godfrey had grown significantly over the years. With multiple offices and a large adviser base, they needed a simple way to gather feedback across the business. Although feedback was encouraged, Helm Godfrey had no formal process for capturing and monitoring feedback from their clients. As a firm committed to using the latest technology, paper-based processes were considered both time consuming and did not fit well with forward thinking nature of the business. In addition, ad-hoc feedback, although very valued, was difficult to collate into meaningful management information. Helm Godfrey wanted to analyse client opinions, in order to identify trends across the business that would influence ongoing client management and service strategy.



### The Solution

The Customer Feedback Centre from FinQS was implemented to provide structure to the feedback process and ensure that gathering client views is now uncomplicated and efficient. In addition, it means that lengthy, manual analysis of feedback received is not necessary as the technology automatically analyses and scores feedback responses to provide benchmarked management information.

The Customer Feedback Centre is managed centrally by Graham Cross, Chief Operations Officer. He says *“The Customer Feedback Centre enables me to quickly and easily monitor client views across all of our advisers and the company as a whole. The ability to import data from our back office system ensures that there is very little effort involved in asking our clients for feedback and that means I can focus on what the management information is telling me about client opinions.”*

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Chief Operations Officer

Helm Godfrey Partners Ltd

## Real-time results to evaluate client opinions

The Customer Feedback Centre allows Helm Godfrey to be responsive to feedback, results are collated and presented real time so that Graham can easily evaluate client views on the advice process, documentation or the overall service being delivered. Helm Godfrey now give every client the opportunity to respond to an invitation for feedback as part of the advice and client review process and this means that they continue to deliver a consistently high level of service.

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**Graham Cross**  
Chief Operations Officer  
Helm Godfrey Partners Ltd

### The Result

The Customer Feedback Centre has helped Helm Godfrey monitor best practice within their business and ensures that the services they are providing truly meet the needs of their diverse client base.

Graham Cross comments; *"The questions asked go far beyond simply asking if our clients were satisfied, they really focus on making sure the client understood the advice, and valued the post advice and overall service proposition. The quantitative results highlight areas we need to focus on or indeed emulate and the additional comments that clients can provide in their own words provide a greater depth to the feedback."*

## Positive feedback emphasises the firm's strengths

Through using The Customer Feedback Centre, Helm Godfrey have been able to make client feedback far more than just a method of validating what they do. Within just a few months of implementing The Customer Feedback Centre, response rates were three times higher than those achieved from manual paper-based processes. High levels of positive feedback are received, with around 99% of clients across The Customer Feedback Centre as a whole expressing satisfaction. Such positive responses provide excellent testimonials emphasising the firm's strengths. Clients appreciate that Helm Godfrey are responsive to feedback and this makes them enthusiastic about the company and loyal to its brand. Enthusiastic, loyal clients lead to more referrals and ultimately ensure that the business continues to go from strength to strength.

To make customer feedback really work for your business, contact us now to arrange a demonstration of TCF Centre. Please email [info@finqs.co.uk](mailto:info@finqs.co.uk), telephone 01564 711153 or visit our website at [www.finqs.co.uk](http://www.finqs.co.uk)

