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Case Study – GAINING MANY NEW OPPORTUNITIES WITH CLIENTS

The Firm

Scott-Moncrieff is one of Scotland's leading independent firms of chartered accountants and business advisers. It has expertise in financial assurance, risk management, improving performance, taxation and wealth management, and around 60 fee earners work for the firm in Edinburgh and Glasgow

The Business Problem

The firm had been using an annual independent feedback process provided by another supplier. While this enabled them to track performance on various aspects of client service on an annual basis, there was limited opportunity to gain feedback speedily shortly after any transaction or matter, and thus respond to any issues raised at that time. The previous solution was very much a "template" which was used by the provider to gain feedback for many firms on the same basis, without any tailoring to specific key issues Scott-Moncrieff wanted to better understand.

The reasons also included the fact that the feedback process was annual, so client's perceptions were not necessarily "fresh", and in particular that the process did not allow clients to flag upcoming developments or plans, in a way which was comfortable for them and not intrusive, while also opening up future dialogue with that client.

The Solution

Based on our ClearerView methodology, we worked with Scott-Moncrieff to build a process and survey that better enabled them to track service performance and gain much more actionable information – in particular opportunities to extend the relationship with clients which the client has said they would be happy to discuss. Scott-Moncrieff can invite its clients to take part at any time, and it receives regular reports to enable it to track service performance as well as how clients view some key aspects of the firm and how it is positioned. It has gained more insight into market awareness of its services, and what clients see as most relevant to them.

The firm also receives immediate alerts, triggered when the responses from clients indicate that there are issues which Scott-Moncrieff can help with or where the client's response otherwise shows that Scott-Moncrieff should act to strengthen the relationship.

The Benefits

The first 12 months of using this approach has produced around 50 opportunities to extend the relationship with clients that otherwise may well not have been identified, as well as much more extensive and regularly produced management information to help the partnership board and marketers.

As Jennifer Hansen from the firm says: *"Thriving provided a fuller consultation than our previous provider, and asked exactly what they were looking for. Robin gave reasons for asking certain questions, why they should be asked, what mattered, and what to do with the results. It was a personalised service with more flexibility, and the personalised timing of the survey is also better for the client who gives more feedback."*