



The Background



First Financial is a dedicated, family-run mortgage and protection firm based in Stanmore, North London.

Founded in 2000, the business has built a strong reputation over two decades, primarily driven by high-quality service and word-of-mouth recommendations. Today, the firm operates with a team of 20, including 10 advisers supported by a robust administrative and compliance function.





The Challenges

Before fully embracing an integrated digital ecosystem, First Financial faced several operational "pain points":

- **Inefficiency and Fragmentation:** Managing paper files was time-consuming and made accessing client information difficult, especially across different branches of the family business.
- **System Disconnection:** The team previously juggled multiple disparate tools - including separate product sourcing systems, marketing platforms like Survey Monkey, and manual spreadsheet tracking.
- **Manual Data Entry:** Administrators were burdened with "rekeying" data between systems, which not only wasted time but increased the risk of human error and typos.
- **Compliance Oversight:** For Katie Badiani, the firm's Compliance Manager, manually monitoring the tasks and progress of 10 different advisers was nearly impossible without a bird's-eye view of the workflow.

The Solution



Following a recommendation from a leading adviser consulting firm, First Financial transitioned to a fully integrated setup with Twenty7tec, consolidating their CRM, compliance, and sourcing into one platform. Key elements of the solution include:

- **Integrated Sourcing:** By utilising Twenty7tec's RESEARCH sourcing within ADVICE CRM, data now pulls through automatically from RESEARCH to the client record, creating cases directly from illustrations.
- **Customised Workflows & Frameworks:** The firm chose to build bespoke compliance frameworks within ADVICE, alongside fact-finds that mandate specific fields relevant to their unique advice process.
- **Strategic Portal Usage:** To maintain the high-touch, personal service that they are known for, the firm uses the messages and documents feature of the client portal. This allows for secure digital communication without forcing clients to complete complex online forms if they prefer a more traditional approach.
- **Automated Communications:** The firm replaced time-consuming manual marketing emails with pre-populated templates and automated trigger sending, ensuring brand consistency and regulatory accuracy in every client interaction.

The Impact

The move to an integrated Twenty7tec ecosystem has delivered measurable, transformative results for First Financial:

- **Significant Time Savings:** The integration of sourcing alone saves the admin and adviser team approximately 30 minutes per case. With an average of 30 cases per week, this gives the team back roughly 15 hours every week.
- **Massive Compliance Cost Reduction:** The workflow system allows a single compliance manager to oversee the entire firm effectively. Katie Badiani estimates that without these tools, the business would need to hire one or even two additional staff members, representing a cost saving of between £50,000 and £90,000 per year.
- **Enhanced Marketing Agility:** The firm can now execute targeted marketing campaigns in minutes. For a recent private medical insurance launch, they launched a campaign contacting 19,000 clients in just five minutes - a task that previously took hours of manual data extraction and onward analysis.
- **Remote Operational Stability:** The cloud-based nature of the system has enabled key staff to work remotely without any loss in oversight or productivity, enabling First Finance to retain talent.



"Twenty7tec doesn't just provide a CRM; it provides an efficiency ecosystem. Whether it's automating our compliance checks and workflows or launching a marketing campaign to 19,000 clients in five minutes, the platform allows us to operate with the speed and sophistication of a much larger firm while keeping our overheads lean."

— Katie Badiani, Compliance Manager, First Financial

