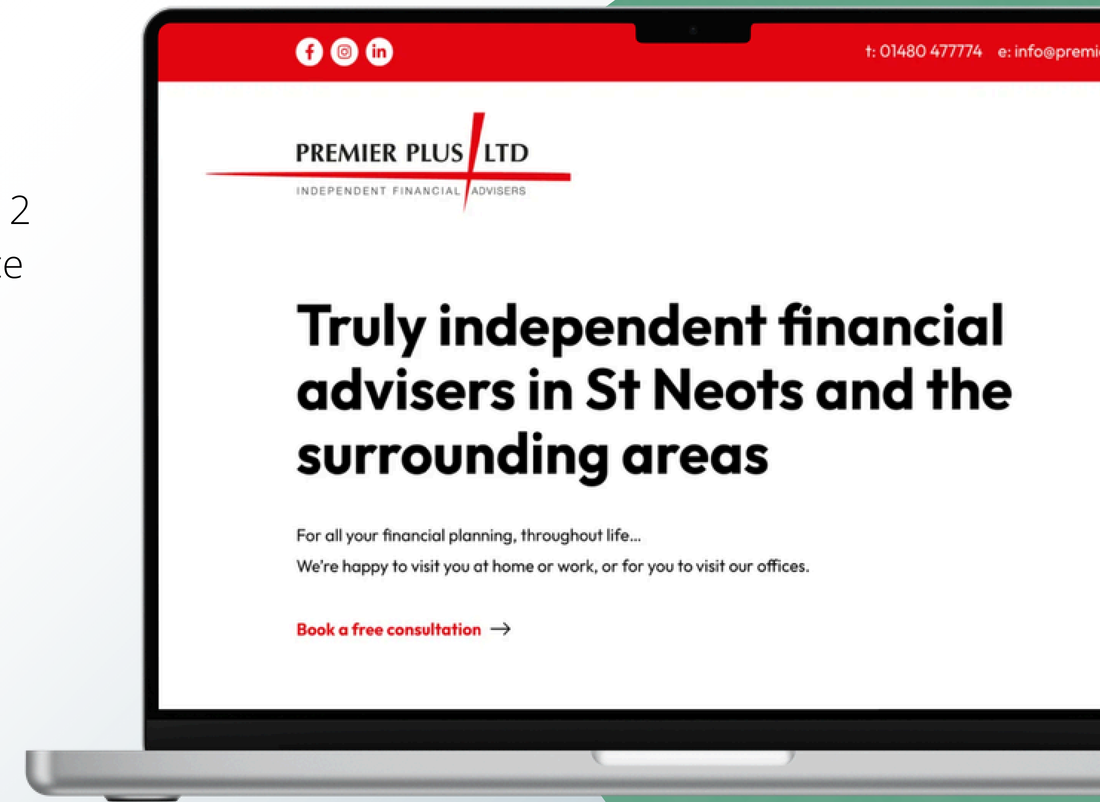
PREMIER PLUS LTD
INDEPENDENT FINANCIAL ADVISERS

Twenty7tec

The Background

Premier Plus is a prominent, family-run financial services firm based in Cambridgeshire. Established 29 years, the company has grown from a one-man operation into a powerhouse of 25+ professionals. Their expertise spans the financial spectrum, including 12 mortgage advisers, 12 pensions and investments specialists, and 4 life insurance experts alongside a dedicated administrative team.

Operating with a core ethos of building long-term relationships rather than charging transactional fees, Premier Plus relies on efficiency to maintain its high-touch, personal service as its client base expands.



The Challenges

Before adopting a centralised CRM, Premier Plus faced significant operational hurdles that limited their ability to scale:

• **Manual Paper Trails:** The firm relied on a physical filing and paper-based systems, meaning the retrieval of a single document or case required manual searching, which was both time-consuming and inefficient.

• **Geographic & Physical Constraints:** Without a digital CRM, every application required wet signatures and physical photocopies of passports. Advisers spent a substantial portion of their week "on the road" visiting clients, leaving little time for actual case writing.

• **Volume Limitations:** Due to the heavy administrative burden of paper files and manual data entry, advisers were often limited to managing a maximum of 10 ongoing cases at any one time.

• **Business Continuity Risks:** With information stored in physical files or individual email inboxes, it was difficult for the team to provide seamless cover if an adviser was unexpectedly absent.

The Solution

By integrating ADVICE CRM into the heart of the business, Premier Plus transformed its workflow:

• **Digital "Source of Truth":** Every phone call, email, and inquiry note is recorded within the CRM. This creates a comprehensive, compliant audit trail that informs suitability letters and ensures no detail is lost.

• **Proactive Review Reporting:** The firm utilises custom "Mortgage Review Reports" to identify clients whose fixed-rate deals are ending. This allows advisers to reach out six months in advance, securing renewals and retaining clients.

• **Task & Workflow Management:** Advisers use the system's intuitive interface and recent client lists to jump between cases instantly – enabling the effective management of larger caseloads, and additional revenue generation

• **Administrative Synergy:** By using the CRM as a central repository, advisers working remotely can "drop" documents into a digital inbox for administrators to process, eliminating time delays and back-and-forth communication.

The Impact

The transition from a manual, paper-based firm to a digitally-optimised powerhouse has yielded remarkable results:

- **Massive Increase in Capacity:** Technology has fundamentally shifted what a single adviser can achieve. While 10 cases were once the limit, Roxy Hull now manages over 88 cases, alongside active inquiries simultaneously.

- **Significant Time Savings:** Premier Plus estimates an average saving of 30 minutes per case. This efficiency is driven by instant access to digital documents and the elimination of manual data retrieval from physical archives.

- **Uninterrupted Business Continuity:** The value of the implementing ADVICE was proven when an adviser was sidelined for six weeks due to an accident. Because every note and document was stored in the CRM, the rest of the team was able to "keep calm and carry on" immediately, without any disruption to the client journey.

- **Client Retention & Relationship Building:** The system's reporting tools have turned a transactional process into a relationship-driven one. By proactively reaching out to existing clients, the firm reinforces its "client for life" philosophy.

- **Commission Accuracy:** The back-office reconciliation features allow the firm to track every penny of commission, from major mortgage payments to tiny indemnity renewals, ensuring the company's finances line up perfectly every month.

"Over the last 29 years, our company ethos has always been to build relationships with our clients, from their first home to retirement. The CRM has multiple functionalities which we use every day, making it easy for us to look after almost 14,000 clients, with the same personal and individual touch that we did 29 years ago...."

— Roxy Hull, Mortgage Adviser, Premier Plus

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