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CLIENT FEEDBACK SURVEY

2022

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ABOUT THIS SURVEY

We regularly survey our clients to request their opinion on how we are doing. This takes a number of forms:

- Verbal surveys after initial work
- Testimonials and reviews
- Video feedback
- This survey

This survey was conducted with all current clients online and anonymously in August 2022. Clients were asked to answer 9 multiple-choice questions, and were also given the option to provide voluntary written feedback to 4 further questions. We received responses from 25% of clients.

We take this feedback very seriously, as it allows us to understand if we provide a service that clients value and understand. We have used this feedback to make many improvements to client services and communications.

You can see our client testimonials here:
https://www.woodruff-fp.co.uk/client-testimonials/

This page has 6 client story videos, along with dozens of written testimonials.

You can also view public reviews on Google and Facebook.

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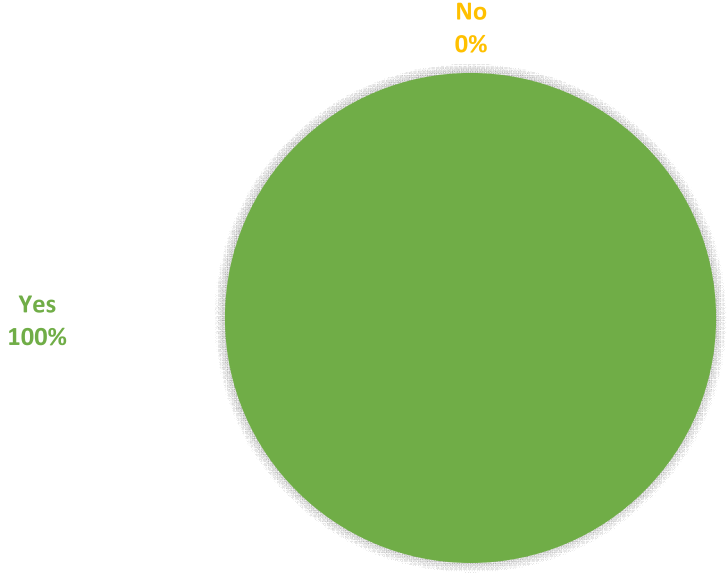
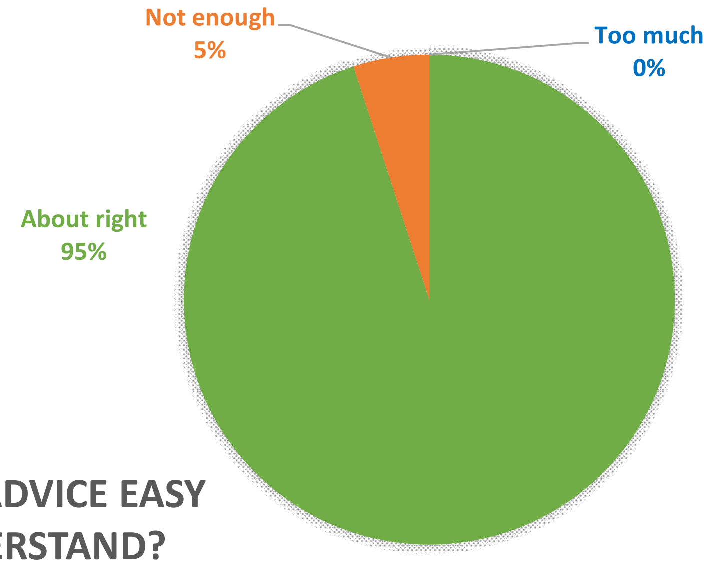
SURVEY
RESULTS

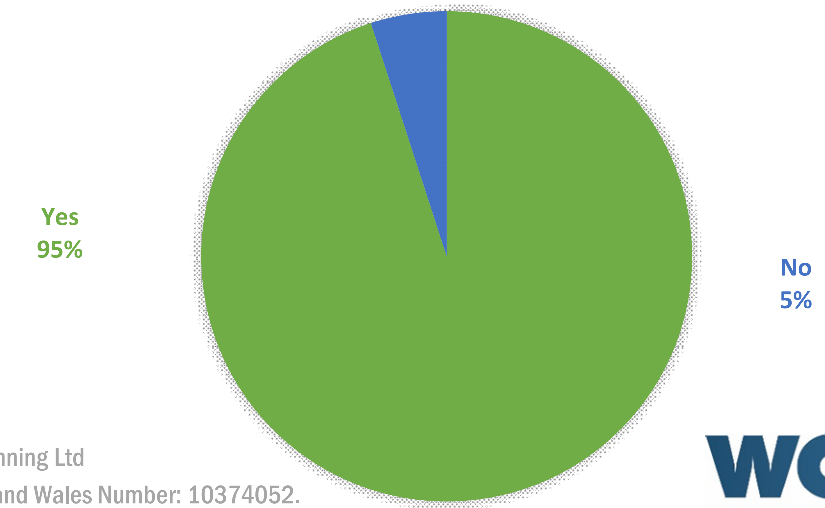
1. DOES FINANCIAL PLANNING HELP YOU TO ACHIEVE YOUR GOALS?



2. DO WE COMMUNICATE ENOUGH REGARDING YOUR INVESTMENTS?



3. IS OUR ADVICE EASY TO UNDERSTAND?



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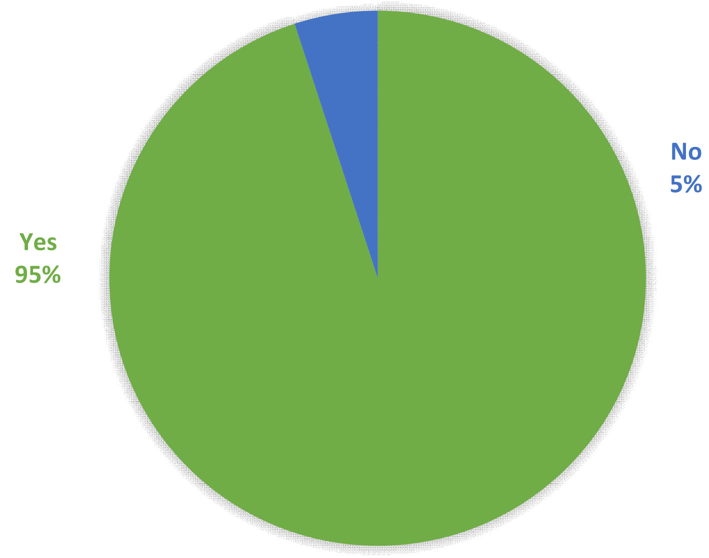
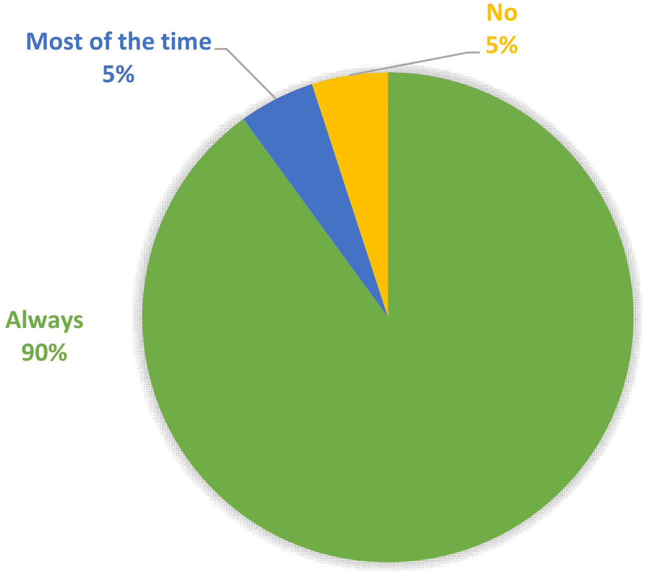
RESULTS

4. DO WE CARE ABOUT YOUR NEEDS?



5. CAN YOU TRUST US TO LOOK AFTER YOUR BEST INTERESTS?



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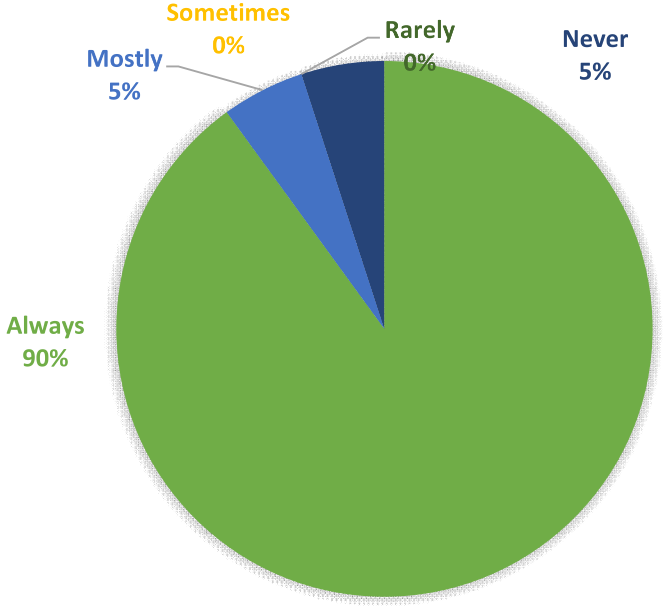
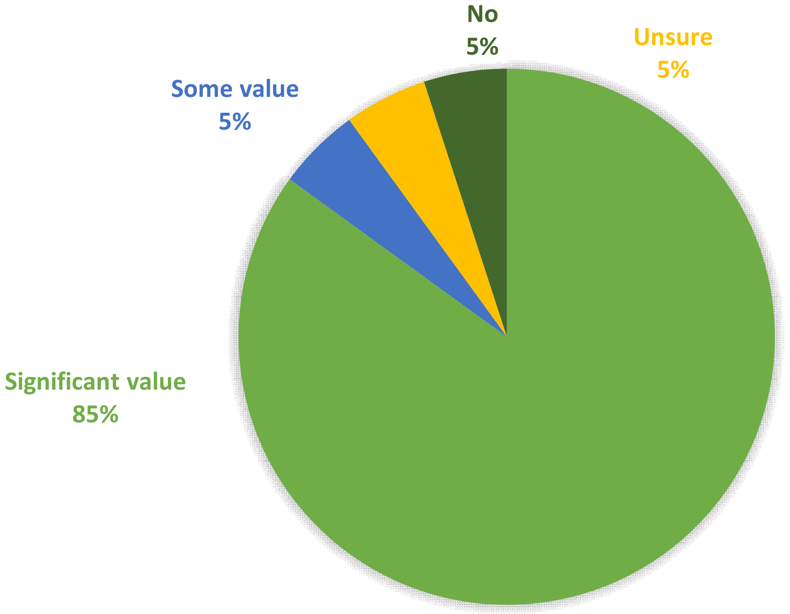
6. DO WE DELIVER ON OUR PROMISES?



7. DO YOU GET VALUE FROM OUR SERVICE?



SURVEY
RESULTS

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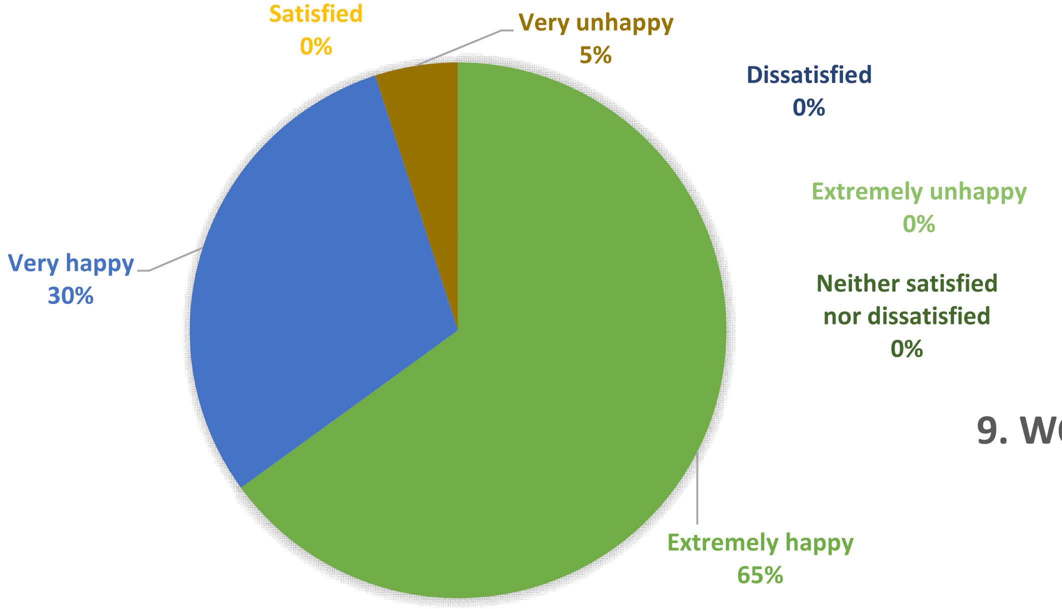
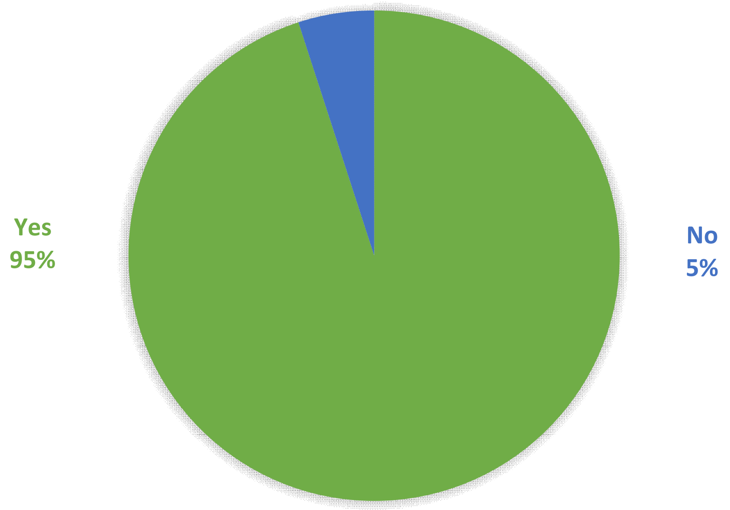
RESULTS

8. HOW SATISFIED ARE YOU WITH OUR SERVICE?



9. WOULD YOU RECOMMEND OUR SERVICE TO A FRIEND?



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WHAT DO WE DO

BEST?

What do we do best? Clients had the option to provide written feedback:

“Clear and constructive advice tailored and flexible to our needs and requirements.”

“You provide clear, professional help with supporting information.”

“Good communication.”

“You provide a deep understanding of our financial position, and what-ifs.”

“You listen well.”

“We have a clear investment strategy.”

“Pragmatic advice.”

“Personal contact and a good understanding of us.”

“Regular communication.”

“You act professionally.”

“You keep in regular contact, and communicate well.”

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HOW ARE WE DIFFERENT?

How are we different? Clients had the option to provide written feedback:

“You make us feel valued.”

“Advice is accessible, down to earth and practical.”

“You offer a truly client-focused service.”

“You provide regular reports and updates.”

“You really do know us.”

“Your service is probably more thorough than other advisers, even though this might result in slightly higher fees.”

“You offer a personal service.”

“You take the time to understand the client.”

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WHY DID YOU CHOOSE US?

Why did you choose us? Clients had the option to provide written feedback:

"As a result of a recommendation."

"I watched your YouTube videos."

"As a result of your reputation through word of mouth."

"Initially from a recommendation, and then once trust was built up."

"In our introductory phone call you were very clear about your role and services you could provide, plus charges."

" As a result of how we were treated – personal experience."

"You were recommended to me."

"A personal friend recommended you."

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What could we do better? Clients had the option to provide written feedback:

We excluded multiple kind comments where clients stated that nothing came to mind.

"For some clients the sheer volume of information can be overwhelming, especially data provided in graph or tabular form. Clearly, you are obliged to provide all relevant information, but this can make it difficult for the client to determine which are the major points worthy of further investigation and which are less significant."

Our response: We are aware that sometimes the investment data we provide can be technical. We want to provide accessible and clear communications, so you can make decisions with confidence.

Your investment management report is a lengthy, and technical document. This aims to help you to understand what has happened to your portfolio, and what needs to change. Some people love the detail in this report, but many do not.
For this reason, we break the report down into 3 sections:

1. Executive summary (2-3 pages)
   This should give you the top-level information necessary to make a decision.
2. Research (12-15 pages)
   This explains what has happened and what we propose to change – a more detailed explanation of the summary.
3. Appendices (blue pages)
   Further technical detail should this be required. We do not expect you to read this all!

Your adviser will visually explain the main parts of the report in your review meeting. We are taking feedback for the level of detail you want to cover, and will adjust to your preferences.

WHAT COULD WE DO BETTER?

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WHAT COULD WE DO BETTER?

What could we do better?

Clients had the option to provide written feedback: We excluded multiple kind comments where clients stated that nothing came to mind.

"Trivial conversations with no financial information, could be done via email. The authenticated "Portal" is fine to keep things private but a chore to sign into, when the conversation doesn't warrant such privacy."

Our response: You raise a fair point about non-sensitive data, and the convenience of email.

Obviously, we have a responsibility to take the security of your financial and personal data seriously, and this is the main reason why we offer a secure portal for sensitive information.
This also allows you to access investment valuations, and to store documents securely. This system is much like those operated by most financial institutions.

We previously communicated the fact that one of our clients had their email hacked. This led to the criminals attempting to access their investments using emails. We try to minimise this risk using the portal, as the data is encrypted, and so this is more secure than email. Of course, we accept that not all communications require this level of stringency.

Some clients prefer not to use the portal, and ask us to use email instead. We are happy to operate in this way if that suits you. As this is less secure, we have a policy to password-protect documents with sensitive information, and so this operates much like the portal from that perspective.

Other clients are content to receive all communications from us via the portal.

If you want us to tailor your communications, we are happy to do so – just let us know.

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Helping you secure your future and live your dreams

CLARITY

Our Prosper service is designed to help you gain complete clarity over your present and future financial positions. We use our planning software to show you realistic scenarios that illustrate the possible effects that future financial decisions and events might have.

This gives you peace of mind and the confidence to start working towards your goals, safe in the knowledge that you will be financially secure along the way.

FOCUS

When you fully understand where you are now, and where you want to be, you will be able to focus on what truly matters to you.
With this knowledge we can then put together a strategic plan to enable you to make your dream future a reality.

With a comprehensive Financial Plan in place, you will take control of your finances and focus on getting to your goals as quickly as possible.

FREEDOM

With your financial Plan in place you can sit back and relax, safe in the knowledge that your money is being looked after by regulated experts with a track record for growth and a genuine dedication to customer care.

With the comfort of knowing that you are covered no matter what happens, you will be free to focus on living the life of your dreams.

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Call us today to book a free financial review at our offices in Colchester, Essex

☎ 01206 919101

Click below

GET IN TOUCH

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