



It's gold this time!
JULY 2018



CLIFTON
Asset Management Plc



Investor in
Customers®
Gold 2018

Following this year's customer service assessment, Clifton Asset Management are celebrating having achieved an outstanding Gold award. Read their story below.

The Challenge – To demonstrate customers are central to everything they do

Clifton Asset Management asked Investor in Customers (IIC) to run a project with them, starting in 2017, to gain an external and independent assessment of their current levels of customer service and to identify any potential areas for improvement.

The Clifton Asset Management plc group includes two financial advisory businesses, a pension provider and a fin-tech platform which helps SMEs raise debt finance. Their clients are predominantly business owners and, together with their staff, are their most important asset.

The Solution

The Investor in Customers (IIC) award is an independent mark of distinction based on a model which measures the customer experience in an impartial way, taking into account internal perceptions as well as the external customer view. There are 3 award levels – gold, silver and bronze which are derived from a published standard and give prospective customers the confidence about the customer experience they will receive from Clifton. The award is an independent assessment of excellence in the field of customer service and customer relationships and helps awarded companies differentiate themselves from their competitors.

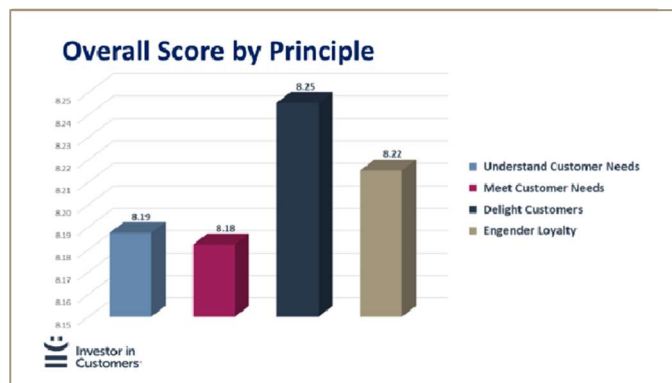
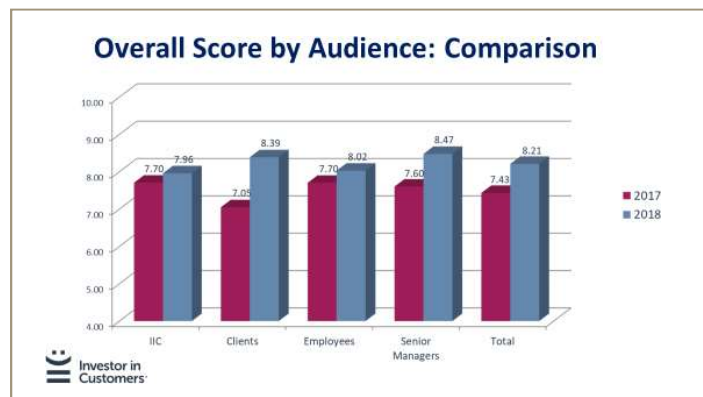


The assessment is built around **four principles of customer experience**: Understand Customer Needs, Meet Customer Needs, Delight Customers and Create Loyalty. These principles are then divided into a further **16 themes**.

The Outcome

In 2017, Clifton Asset Management achieved an outstanding silver award, but in 2018 it is **GOLD!**

An exceptional result with increases across all sectors and all 4 IIC themes, with the highest in client scores – the best year-on-year rise we have seen. Of particular note were around the principles of ‘Quality Relationship’ ‘Treating Customers Fairly’ and ‘Feedback’ proving that the client is always at the heart of their business.



There has been significant improvement over the last 12 months by imbedding some of the suggestions made after the 2017 assessment. That said, even though they have now reached the gold standard, their task is to continue to improve and maintain the highest level of customer service.

Comments from clients included:

- “Good service, sound advice, great to deal with. Always helpful.”
- “It goes without saying that Clifton's product knowledge and services are exceptional but then there are many competitors who no doubt will be similar. The reason I would recommend Clifton is I have always found their honesty and integrity to be of the utmost and they put the needs of client before their own. I only recommend to others those I can trust.”
- “The staff that I have dealt with are brilliant, they know who I am when I call. The service I have suits my needs and they listen and ensure that my wishes are carried out.”
- “I would thoroughly recommend the company because the staff are very professional, take time to understand your circumstances and provide excellent services to enable their clients to realise their ambitions.”

Adam Tavener, Chairman of Clifton Asset Management said: “We are, of course, delighted to be awarded the Investor in Customers Gold standard. It’s particularly pleasing that so many of our customers value our services so highly. Achieving IIC’s biggest ever year-on-year score improvement was also a real bonus and that’s all down to an amazing level of staff engagement across the whole businesses.”

Sandy Bryson, Director of Investor in Customers added:

“Clifton has achieved an exceptional IIC assessment result and been accredited with IIC’s Gold award, improving on their Silver award in 2017. This is testimony to all the hard work the Clifton team has made implementing the business insights recommended by IIC in their 2017 assessment. Clifton has also introduced the concept of Total Customer Satisfaction to the business. The effect of these changes has been particularly recognised by their clients. Their clients’ average score has increased higher than any other IIC client average score from the previous years’ assessment. This is a phenomenal achievement.”

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