

CASE STUDY:

Sandringham Financial Partners



Claremon marketing portal helps financial partners stay on-brand and compliant

Background

Sandringham Financial Partners is a UK market-leader in the provision of tailored independent financial advice. With over 280 financial Advisers and partners working nationally, giving expert advice on investments, pensions, mortgages, protection and estate planning.



At A Glance

The Client

Sandringham Financial Partners

The Challenge

Sandringham used to manually create artwork for each adviser taking the Chief Technology Officer over a day a week to handle the demand, a hugely inefficient use of his time. They were looking for improved print quality, service and turnaround times for their Advisers' print requirements.

The Solution

Claremon conducted a print audit and identified 3 key areas of improvement:

1. Online templates - To keep all the artwork on brand and compliant for FCA approval. Advisers fill out the templates, saving time and removing resources needed to create artwork.
2. Print turnaround time - To improve service and decrease turnaround times from order to delivery.
3. Approval process - Instant and traceable, each order is allocated to an adviser.

A cost proposal and business case was created to cover the stationery to start with. This then was followed with a suite of documents, such as, Client Agreements and Tax Guides.

The Result

A portal created to compliment the brand style of Sandringham. An increase in orders through the marketing department due to the faster turnaround. Saving resources in the marketing department as the pre-designed templates were on-brand and compliant prior to receiving the orders. The ability for Head Office to approve orders prior to print.



The Challenge

Sandringham's main challenge was the management resource spent on creating bespoke artwork for every adviser as they requested a product. The company is made up of two categories, Trading Style Advisers who trade under the Sandringham umbrella but have their own company name and, more often than not, their own brand. Sandringham Partners are the other category, and they use the Sandringham name and branding throughout their printed materials.

The Advisers were experiencing a back-log in the creation of the artwork they were requesting as the resources within the marketing department were already stretched. This also resulted in a high number of calls to the marketing department chasing up orders.

Although the printed materials they were receiving were of a good quality, keeping on-brand and colour specific was of vital importance. Turnaround time was not particularly quick, which when combined with the process delays in Head Office, led to an unsatisfactory service for their Advisers.

One of the apprehensions from Sandringham was the user experience. As this was a completely new system and method of ordering, it needed to be self explanatory and user friendly for the Advisers.



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Having our new stationery shop has removed the majority of the resource heavy process we were previously going through for each order. Using the template designs and dynamic content means Advisers can create their own stationery.

**Chief Technology Officer
Sandringham**

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The Solution

Claremon created personalised templates for all Sandringham's marketing and stationery materials, all of which had been approved for compliance and were fully on-brand.

Two categories were created, one for the Sandringham Partners and one for the Trading Style Advisers. The Trading Styles templates gave the Advisers the option to upload their own logo to the pre-designed artwork or enter their business name into the template creating a logotype on the document for them. The Sandringham Partners templates were all based on the Sandringham branding and allowed users to make changes to contact details.

The approval process was set up so that the marketing department could approve any orders prior to order confirmation. Static (non-editable) documents were removed from this process to reduce the workload of the marketing department.

Claremon printed bulk quantities of the non-editable documents which reduced the turnaround time from order to delivery.

Claremon also created a User Guide and a Price List to help users navigate the site, greatly improving the overall user experience.

Claremon update the online templates as requested whenever there are any changes due to compliance requirements or to Sandringham's terms and conditions, or when any new marketing materials are designed.

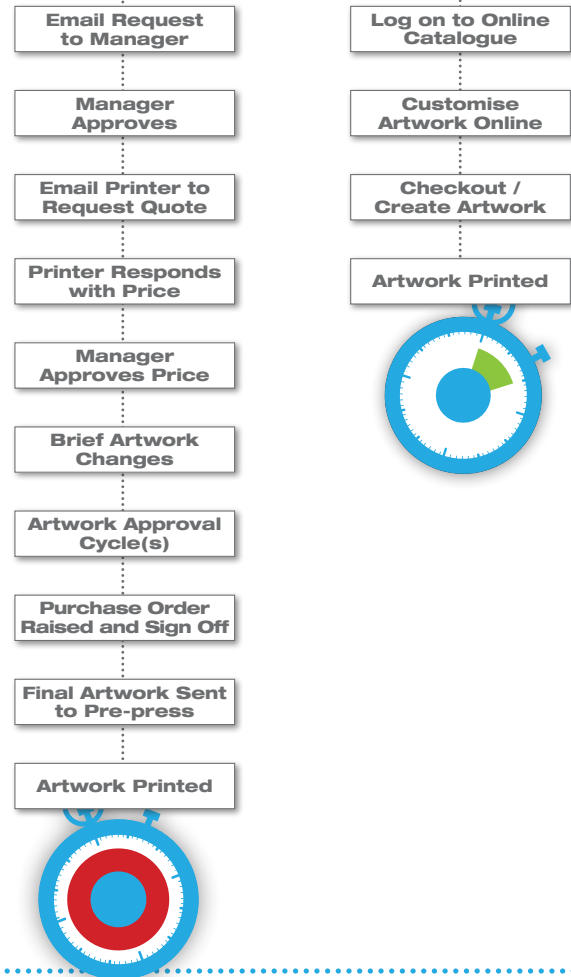
Advisers are now able to make payment at point of order, requiring no intervention from the marketing department.

OTHER PRINTERS

4 DAYS

CLAREMON

10 MINUTES



“ Having met with Sandringham, we understood that their issue regarding time spent on providing their Advisers artwork could be solved by our online portal, allowing them to concentrate on business growth.

John Conroy
Claremon Ltd

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The Result

Users found the site simple and easy to use, with help from the User Guide documents created if they had any queries.

All of the Advisers are now ordering their stationery and marketing collateral from the portal. The orders are easy to track, the service and turnaround times have improved and the quality of the print is of the highest standard.

As Sandringham is growing they needed to be as efficient as possible. The marketing portal Claremon have supplied has helped them overcome a major challenge they were having in resources helping them strengthen and grow their business much more effectively.



We're saving so much time we barely have to think about stationery anymore.

**Marketing Department
Sandringham**

