

FT First Thought
FS Financial Services



FLG

Customer success story:

**why First Thought Financial
Services chose FLG to
help grow their business**

First Thought Financial Services, a Hertfordshire-based mortgage and insurance broker, offers a friendly service and expert know-how to ensure their customers get the right mortgage for a new house, a property to let, or to re-mortgage their existing home. They also assure peace-of-mind by advising on the appropriate insurance and protection to cover customers and their properties.

We spoke to William Gibson, Director of [First Thought Financial Services](#), who explained why they selected FLG to help them move forward with their plans to grow the business.

Discover the role FLG plays in this financial services firm:

- Keeps track of all inbound leads from multiple sources
- Logs and records calls with our CircleLoop integration
- All lead activity can be viewed at a glance in one single place
- Easy reporting functionality to track adviser workload and conversions.



Challenge

William set up the high street business two and a half years ago with one other person, and spent the best part of a year getting their name out and forming relationships with local estate agents. Now, they're a team of ten and an established financial services firm providing mortgages and insurance products, with plans to bring in more advisers and expand into pensions and investments in the near future.

Like many small businesses when they start out, the team didn't have a CRM in place and was using a combination of emails, documents and spreadsheets to manage their leads. Advisers would assign leads to themselves and manually input information from telephone, email and purchased leads into their own spreadsheets, and schedule call backs and appointments through email and calendar invites.

Now with seven advisers, they were finding it difficult to keep track of everything and felt it was no longer sustainable to manage things manually. That's why they began their search for a system that could help them capture enquiries, hold everything in one place, and manage leads through to conversion and beyond.

Solution

William first heard about FLG when one of their lead providers recommended a few CRM systems they felt would work well for First Thought Financial Services, one advantage being that FLG has a direct integration with the lead provider's system. There were some big CRM names on the list, and William was surprised that all bar FLG weren't responsive to his enquiry and failed to listen to his requirements:

"They were too concerned with showing off the bells and whistles of functionality we didn't require and wasted a lot of time going backwards and forwards without telling me if it could actually do what we needed it to do and how much it would cost. Some of them lacked important functionality too, such as reporting, but FLG ticked all the boxes."

William Gibson, Director

He was impressed with how quickly we got back to him to acknowledge his enquiry and discuss FLG's suitability for their sales process in an informative, pressure-free way. He also saw the value he could get from our Concierge plan, and subscribed to get hands-on assistance personalising the set-up and API integrations to work exactly how he wanted. Whenever he needed to tweak it, he was able to call and have his account manager change it for him immediately.

Fantastic System. I have used various different CRM systems over the years but FLG has functionalities that none of the others do. Our Account Manager Dan has been a great help from start to finish and is always on the other end of the phone when needed. Thanks Guys!

William Gibson, Director



Success

Since the team started using FLG a few months ago, already they've noticed some big improvements. Here are just a few examples:

- Leads from various lead providers are automatically populated in FLG, cutting down the number of windows they used to have open at once to just FLG and their quoting system.
- They can send an SMS from FLG when they can't reach leads on the phone, letting them know when to expect a callback and improving the chances of successfully making contact.
- The integrated CircleLoop telephony system makes inbound and outbound calls easier, allowing them to identify callers and who the lead is assigned to at a glance to deliver a slick and professional yet personal service.
- Adviser workloads and time spent on the phone can now be tracked to measure input and success.
- Reporting tools easily track conversions, and identify leads at risk of going cold to filter them out and make sure they're followed up – no more missed opportunities.

Next on their to-do list is to set up customisable email templates in FLG so that advisers can easily follow up on conversations with customers over the phone. By reducing time-consuming administrative tasks in this way, advisers will have more time to focus on bringing in new business.

I asked William if he'd recommend FLG to other businesses, and he joked that he wouldn't because he doesn't want them to be as successful as his!

"FLG is cost-effective and you get real value for money. It's much more accessible than some of the big CRM names, and at a fifth of the price it does everything we need it to do. I feel it would improve any business that doesn't have a CRM system in place."

William Gibson, Director

Although they haven't been using FLG for very long, William is confident that it'll scale with them and can meet all of their future requirements as they continue to bring in more advisers and grow the business.

Why do our customers choose FLG?

Easy-to-use CRM

Manage 100,000s of leads

Automate processes

Tailored to your sales process

Personal, hands-on setup

UK-based phone support

Securely hosted in the UK

5 star Trustpilot customer rating



**For more information or
to get a free demo visit
[getflg.com](https://www.getflg.com)**