



FLG



Customer success story:

how FLG helped Centurion
Estate Planning to launch, grow
and thrive during COVID times

Stirling-based Centurion Estate Planning provide expert consumer services including wills, power of attorney, home protection plans, trusts and funeral plans. Since their launch in August 2020, they have become the largest and fastest-growing estate planning business in Scotland, with plans to continue branching out throughout the UK to make estate planning easy to navigate, affordable and accessible for all.

We spoke to Bill Burey, IT Director at Centurion Estate Planning, who explained why they chose FLG to help them launch, grow and thrive during COVID times, and how it's enabled them to provide an excellent service to their clients:

- A tried and tested CRM focused on automated workflows
- Feature-rich and flexible
- A central view for everything they do
- Scalable and cost-effective
- Secure and compliant
- Easy to integrate with third-party systems
- A UK-based support team of fantastic people
- A reliable solution that's never let them down.



On a mission to normalise estate planning

Bill has worked for Centurion since its inception in 2020, and is also a business shareholder. In his role of IT Director, he is responsible for all the technology and systems across the business. What started as a team of five in the thick of the pandemic has since grown to a team of 35 that has recently started to branch out to the North East of England.

Centurion serves a consumer market with a range of estate planning products. Over the past couple of years, they have seen this market grow and shift from a predominantly older market to a younger one. Sadly this has been heavily influenced by COVID, with people having loved ones in hospital, often incapacitated without wills or powers of attorney in place. Centurion plays an important role in helping people navigate this sensitive subject, which is often thought of as morbid – nobody wants to talk about end-of-life planning, but once clients get their affairs in order they feel relieved, safer, and a lot more at peace.

The company is on a mission to demystify estate planning and make it more affordable and accessible for all. This all starts with putting clients at the heart of everything they do, having a client-centric view and providing excellent service. To assist them on this mission, they selected FLG's CRM software to support their business.

Delivering the best possible service

Bill has been using FLG since 2015 in the last three businesses he's worked with in financial services, so he was already familiar with its functionality and had a solid understanding of how it would be able to support the new venture.

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"FLG has never let me down. It always serves well and we can easily integrate other systems using its API or webhooks. As a startup business, you don't want to worry about uptime and hiring people to take care of servers and backups. Having FLG as a web-based solution out of the box has all of that covered, and it's been reliable and scalable from day one."

He knew it would support their client-focused approach and give them business continuity throughout the pandemic, without compromising on the client experience. Appointments typically take place in clients' homes due to the private nature of the products, but their consultants had to start working from home and switch to telephone and video calls. With FLG, they already had everything in place to work as normal using their laptops, with no requirements for any additional technology.

With all the necessary communication tools including emails and SMS, as well as built-in appointment scheduling and secure document uploads, when clients can't be reached on the phone consultants can easily invite them to book their own appointments and send requests for ID and other documentation, and clients have a simple way to complete these tasks and add documents to their records in their own time.

"It's been a really seamless experience. People have busy lives and are using their mobile devices more and more across the board in terms of age range. Some don't have email or don't open them, and all companies have email challenges such as spam. FLG's SMS functionality is a key communication channel that's allowed us to contact clients faster and speed up our processes. This has really helped our efficiency and client response rate."

“I would 100% recommend FLG to other businesses. I have used it in the last three businesses I’ve worked with and I will probably continue to do so if I go on to work with any others.

My overall experience has been fantastic. I can’t fault it, I can’t fault the team. It’s cost-effective, the support is well managed, its reliable.

Everything we expect, it delivers and we’re very happy with it. I have no qualms whatsoever in giving FLG a five-star review.”

**Bill Burey,
IT Director**



Tools to automate and control processes

Centurion’s web-based marketing invites potential clients to complete a form to receive further information. The details are automatically added to FLG and their dialler system, ready for the appointment setting team to call and see how they can assist. All notes, actions and appointments are recorded in FLG, which trigger automated workflows to thank them for their enquiry, confirm appointments and send reminders, etc.

With consultants out on the road, excellent communication is key to avoid wasting time if a client forgets about or has to change an appointment. Other workflows are triggered if for example somebody is off sick or there is a delay with a product, with zero reliance on staff having to remember to take action to keep clients informed every step of the way.

Plus, FLG’s central view means whoever answers the phone has all client information at their fingertips, ready to assist whenever they need it. Clients are delighted with Centurion’s professionalism – with the right technology in place and excellent consultant and customer service teams, they often receive positive feedback on their timely and responsive communication, as reflected in their five-star Feefo review.

FLG’s focus on automation plays an important role in making things quicker and easier for staff and clients. Its flexibility allows them to automate processes throughout the entire business, rest assured that things will get done on time, and be automatically alerted on any actions or events they need to know about. The reporting functionality also gives Centurion a complete view of all sales and marketing activities, and they’ve been able to integrate other systems to use FLG as a central view of all business activity.

A secure, reliable solution that’s well supported

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In terms of security and repudiation issues, FLG’s compliance features give Centurion complete peace of mind and reassurance. They can restrict access by IP address, consultants cannot edit or delete notes, and if somebody leaves the business they can shut down their account straight away.

When it comes to support, Bill really appreciates the fact that FLG has a UK-based, in-house team. Many companies outsource their support, meaning staff are not close to the product and there can be language barriers. Not having to worry about that is a huge plus for Centurion.

“The people are fantastic and they always get back to me. I’ve never had a problem or a question that hasn’t been answered. I also love being asked for ideas and suggestions in the product feedback forum. Many companies have these, but rarely act on them. I can track ideas from the interactive community of FLG users, and see changes that have been made. The fact that the team is actively involved with this is fantastic.”

Ready to grow and expand throughout the UK

Centurion is now on a growth trajectory, with plans to spread its message far and wide across the rest of the UK and an ambition to achieve double-digit growth over the next two to three years.

In terms of development, they plan to use FLG’s API and create an online portal for clients to manage their own documentation, and will continue to make use of a third-party service they’ve set up to integrate WhatsApp with FLG to meet the growing demand from consultants and clients to send documents via the messaging service.

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

Free phone and email support

UK-based, in-house teams

Securely hosted in the UK



**For more information or
to get a free demo visit
getflg.com**