

Fidelius awarded IIC Gold

Fidelius Group, an independent financial services company with headquarters based in Bath, offering wealth management and employee benefits, has achieved an exceptional 'Gold' award from leading customer experience experts, Investor in Customers (IIC).

This is the third time Fidelius has been through the IIC process. In 2016, Fidelius narrowly missed out on the Gold award, obtaining Silver. By acting on recommendations from the previous assessment, in 2018 Fidelius achieved their first Gold. The firm did not rest on their laurels and continued to embed improvements within the business, despite going through a period of acquisition, and not only retained their gold but increased their IIC scores still further.

Despite the difficulties the world experienced throughout 2020, Fidelius' clients have been overwhelmingly complimentary about the service and experience that has been delivered by the firm, with comments such as:

- "I would have no hesitation in recommending Fidelius; we have always had excellent service from them."
- "Very comfortable and confident in recommending Fidelius, because of their knowledge, expertise, and customer service."
- "They have always done everything I have asked of them and continue to respond to my needs, often before I realise I have them!!! Great personal service for which I am appreciative."
- "It's important to have honest advice. Fidelius have always found out about our needs first and tailored their advice to my needs rather than a sales process."

Investor in Customers (IIC) is a specialist customer experience (CX) agency. Helping organisations improve customer retention and acquisition through enhancing the experience they provide to their customers and the engagement they have with their employees.

This is done by analysing the gaps between what senior leaders believe should be delivered; what employees think they are providing and the customer's perception of what they receive culminating in a detailed report which highlights shortfalls in CX, compares each of the respondent groups and supplies an action plan to close any identified gaps with suggestions to put improvements in place.

Jim Grant, CEO at Fidelius added: "Forging and nurturing solid relationships has always been a strength within our organisation, but with the substantial growth we are experiencing it was important for Fidelius to put measures in place to continue to truly understand our client experience. This understanding enables us to ensure that the journey of all existing and new clients exceeds expectations. Over the past few years, the recommendations made by IIC have helped us to assess and amend our processes and services, so that we can continue to provide an excellent experience to our clients. In essence, it has helped me and the senior team at Fidelius to make the best business decisions based entirely on client and staff feedback. The feedback we receive from our clients is priceless and it ensures we make changes they want, not what we think they want."

Sandy Bryson, Director at IIC, commented: “Fidelius has achieved another “Gold” award from Investor in Customers for their client experience. Scores from all participants, Clients, Staff, and Senior Managers, have all increased significantly in this year’s assessment, which is testimony to the hard work implemented since their last assessment. I am absolutely delighted for the whole Fidelius team who demonstrably put their clients at the heart of their business.”