



**BARNETT  
WADDINGHAM**  
beyond the expected

2017/18

RISK | PENSIONS | INVESTMENT | INSURANCE



## Self-Invested Pensions client survey result

Focussing on quality service

# Contents

4 So, why would our clients recommend us?  
.....

8 There is always room for improvement  
.....

10 An insight from the inside  
.....

11 The future is bright  
.....

Quality service is integral in financial planning, especially in the complicated and dynamic area of pensions. Having a direct effect on the efficiency of advisers and on the satisfaction and confidence of SIPP members and SSAS trustees, it is important to have personal service that is clear and concise.

Identifying who offers the most suitable service before committing your (or your clients') retirement savings to them is not always easy. So, we submit ourselves to the independent scrutiny of Investor in Customers, whose tried and tested methodology you can trust.

Every single customer of ours is invited to take part in the online survey, meaning the assessment is thorough and exacting. We are thankful to our clients for participating in the survey and are delighted to have achieved a 'Silver' award with a marked and broad-based improvement in our scores.

Along with the data that the assessment produces, there is a rich qualitative side as customers are given the opportunity to comment.

This survey is a reflection of how we are performing and is a good measure to help us improve further.



*Julia*

JULIA BASSETT

Partner and Chief Executive Officer of BW SIPP LLP



*Andrew*

ANDREW ROBERTS

Partner and Head of Small Self-Administered Schemes

## So, why would our clients recommend us?

The survey asked our customers “How likely are you to recommend the company to others?” where they could score us, followed by “Why did you answer the last question as you did?”.

The responses below are from SIPP members, SSAS trustees and professional advisers whose clients use our SIPP or SSAS.

- “I have and do recommend because it is rare to find a gem!”
- “I think the people I have contact are very good, responsive, supportive and professional.”
- “My team at Barnett Waddingham are very good and I would certainly recommend them to anyone.”
- “I have and do recommend because it is rare to find a gem!”
- “Barnett Waddingham are an efficient company which meets all my requirements.”



**“We have always been 100% happy with the service provided.”**

**“They are heads and shoulders ahead of their competitors in knowledge and product flexibility.”**

**“My experience to date has been more than favourable.”**

**“They are straightforward to deal with alongside the fact you have a dedicated point of contact.”**



**"We have  
always been 100%  
happy with the  
service provided."**

## “How likely are you to recommend the company to others?”

“I have had a longstanding relationship with Barnett Waddingham and I have been well looked after.”

“I can absolutely say that Barnett Waddingham’s are the best and have a great reputation!”

“Combination of professionalism and integrity.”

“They are helpful and trustworthy.”

“The staff who have dealt with me have been excellent”

“Efficient, knowledge, reliable and friendly.”

“I believe in professionalism and they have it.”

“I would not hesitate in recommending BW to anyone thinking of saving in a SSAS or a SIPP”

"They make everything so easy."

"They provide consistent service."

"Always impressed by how they deal with me and any queries I have, they are most helpful. "

"I have always received a high standard of service and the products are good."

"They provide the services I want in a timely professional manner."

"I receive a good service - much improved since the last survey."

"Excellent and personalised service."

"We have always had a prompt, polite and efficient service."

"Confident in the company and the way it operates."



## There is always room for improvement

SIPP members and SSAS trustees were also asked the question “What does the company need to do to encourage you to use them again?”. Here are some comments we received.

- “Keep going!”
- “Retain your good staff who make it happen.”
- “Improve response times.”
- “I want to be able to access as much information online in one place about a client’s SIPP. That is not possible yet and needs improving.”
- “Continue the seminars as they are most beneficial.”
- “Keep on listening and responding in a timely fashion and continue to maintain a competitive edge.”
- “Absolutely nothing!”
- “To have one contact point to discuss queries and concerns.”



.....  
“Retain your staff who make  
it happen”  
.....

**“Keep providing  
the current level of  
information  
and support.”**

**“Continue to provide  
a good service -  
especially as that is  
much improved since  
the last survey.”**

**“Keep the flexibility and  
ability to work with  
smaller investors.”**



“Keep on listening and responding in a timely fashion and continue to maintain a competitive edge.”

## An insight from the inside

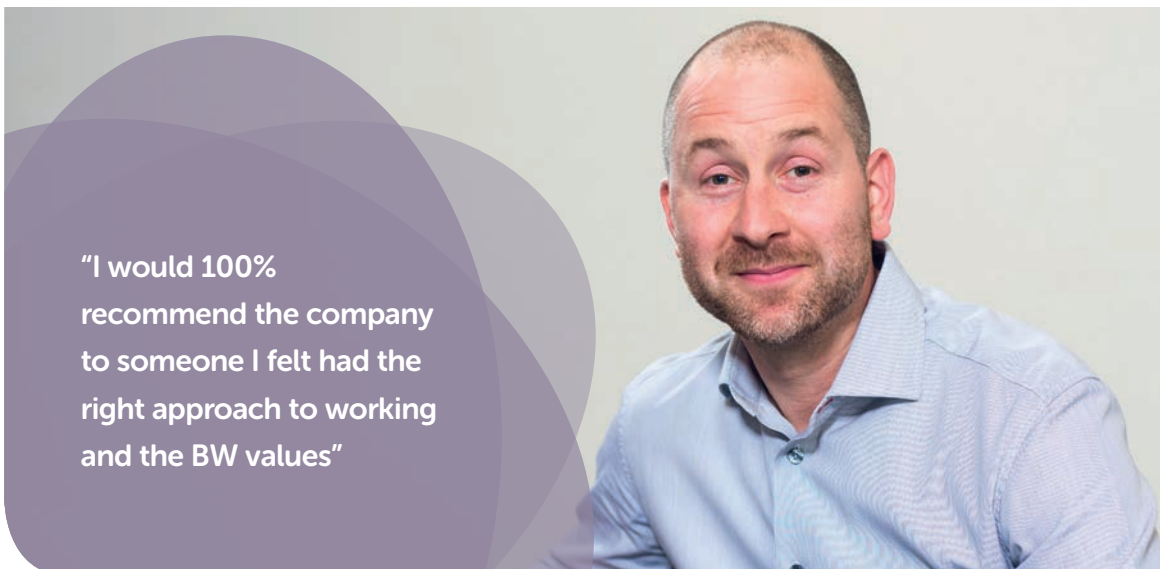
Not only is it important to listen to our clients, but also the people at the heart of what we do. Our employee feedback from the survey is encouraging to read.

Here are some of their responses to “I would recommend the company as a good place to work”.

- The difference in the way we treat our customers, compared to my previous employer, is astounding and makes me feel very grateful to work for a company that genuinely cares about its staff and customers equally.
- I like my job and the people I work with
- It's culture is about 'doing the right thing' and this applies for customers and staff alike
- I would 100% recommend the company to someone I felt had the right approach to working and the BW values
- There is genuinely a very good culture in Barnett Waddingham.



“I would recommend the company as a good place to work”.



## The future is bright

We are pleased with the comments that we have received and we want to implement improvements across the service we provide our customers.

We have therefore been examining the data and the feedback and will be using this to influence our plans and priorities. In some cases, customer requests were already being addressed by our plans; in other cases, new plans have been made.

Our surveyed members and trustee comments are refreshing to see, as we recognise and value everyone's contribution towards our success. Demonstrating integrity to our customers, our collaborative approach will maintain our focus on a quality service into the future.





[www.barnett-waddingham.co.uk/sip](http://www.barnett-waddingham.co.uk/sip)

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Please contact your Barnett Waddingham consultant if you would like to discuss any of the above topics in more detail. Alternatively contact us via the following:

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