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Launch of CRM survey to aid financial advisory businesses

MD of Suuqea believes that financial intermediaries need to improve communication with clients...and shows the way

Suuqea, the innovative and distinctive business consultancy service, has just launched an electronically based Client Relationship Management Survey for use by small to medium sized financial advisory businesses, as a way of improving client communications.

David Cox, Managing Director of Suuqea, believes that, in response to recommendations by the Retail Distribution Review, it is vitally important that financial advisory businesses have a greater understanding of the relationship that exists between themselves and their clients. He also sees this information as being critical if these businesses are to develop an appropriate tariff of services for clients so avoiding the trap of competing purely on price in what is an advice and relationship driven sector.

David comments that this type of research is not traditionally undertaken by small to medium sized financial intermediaries due to cost and limitations on overall resources. However, with client communication, and indeed business in general, being conducted increasingly by email, Suuqea's new CRM survey is an exciting and unique opportunity for them to access constructive market intelligence information of how their clients rate their service at a relatively low cost (a one-off price) and within extremely short time scales.

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Date: 25 February 2009
No of words: 210
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