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CLIENT FEEDBACK SURVEY
2021

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ABOUT THIS **SURVEY**

We regularly survey our clients to request their opinion on how we are doing. This takes a number of forms:

- Verbal surveys after initial work
- Testimonials and reviews
- Video feedback
- This survey

This survey was conducted with all current clients online and anonymously in June 2021. Clients were asked to answer 8 multiple-choice questions, and were also given the option to provide voluntary written feedback to 4 further questions. We received responses from 32% of clients.

We take this feedback very seriously, as it allows us to understand if we provide a service that clients value and understand. We have used this feedback to make many improvements to client services and communications.

You can see our client testimonials here:
https://www.woodruff-fp.co.uk/client-testimonials/

This page has 6 client story videos, along with dozens of written testimonials.

You can also view public reviews on Google and Facebook.

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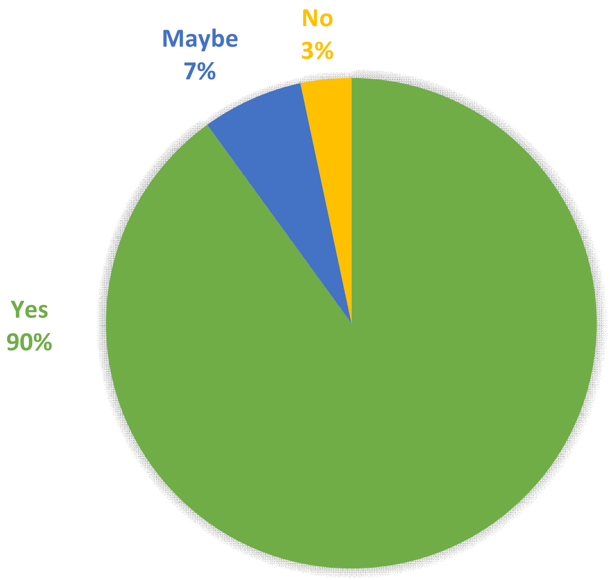
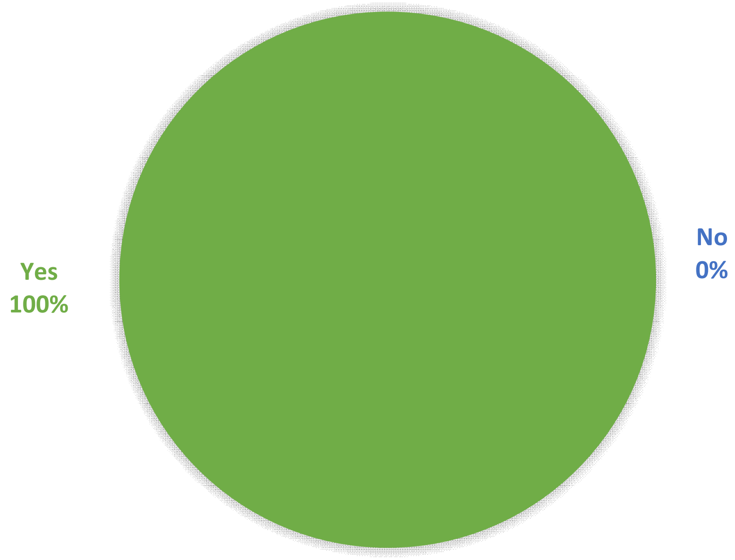
SURVEY

RESULTS

1. DOES FINANCIAL PLANNING HELP YOU TO ACHIEVE YOUR GOALS?



2. IS OUR ADVICE EASY TO UNDERSTAND?



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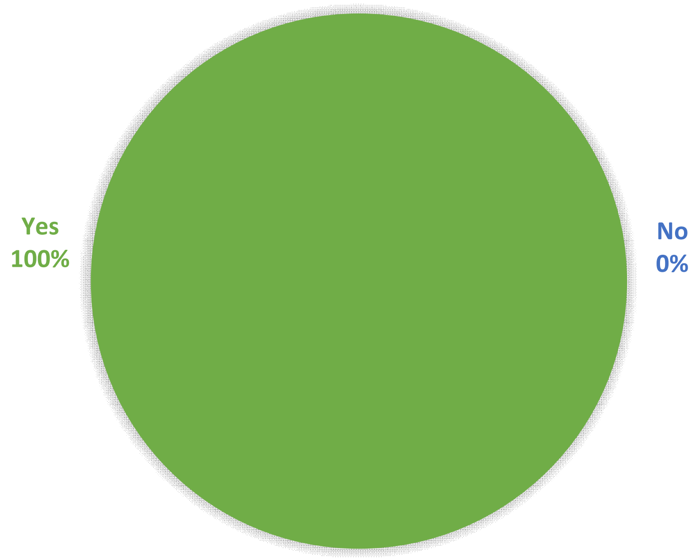
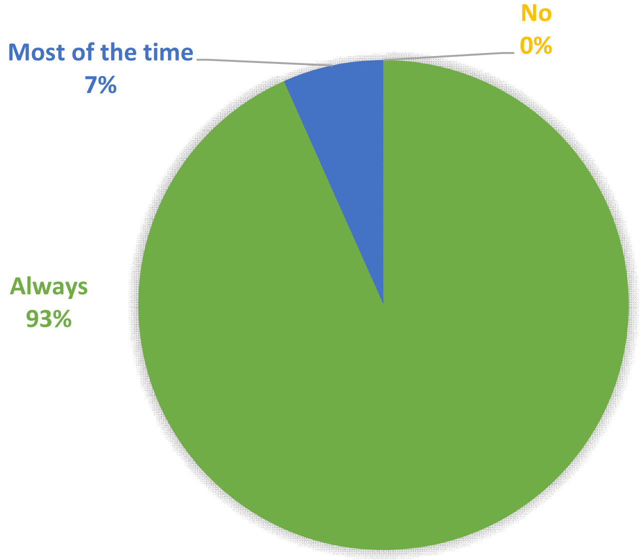
3. DO WE CARE ABOUT YOUR NEEDS?



4. CAN YOU TRUST US TO LOOK AFTER YOUR BEST INTERESTS?



SURVEY **RESULTS**

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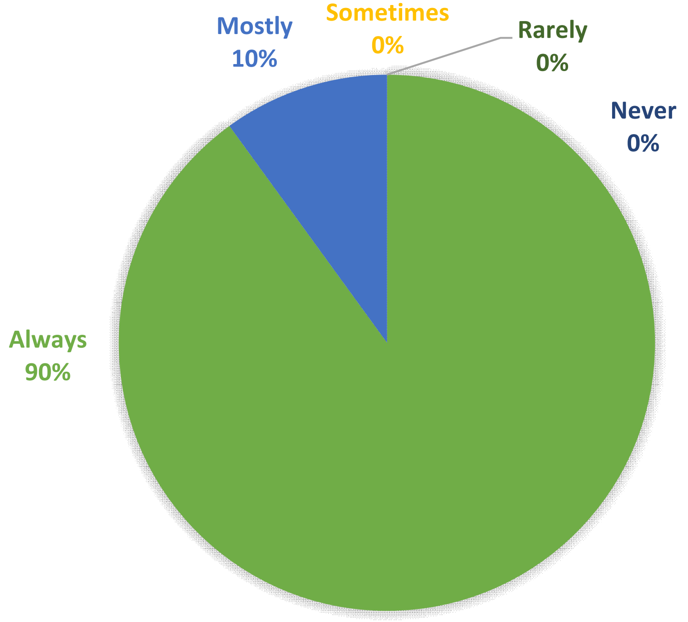
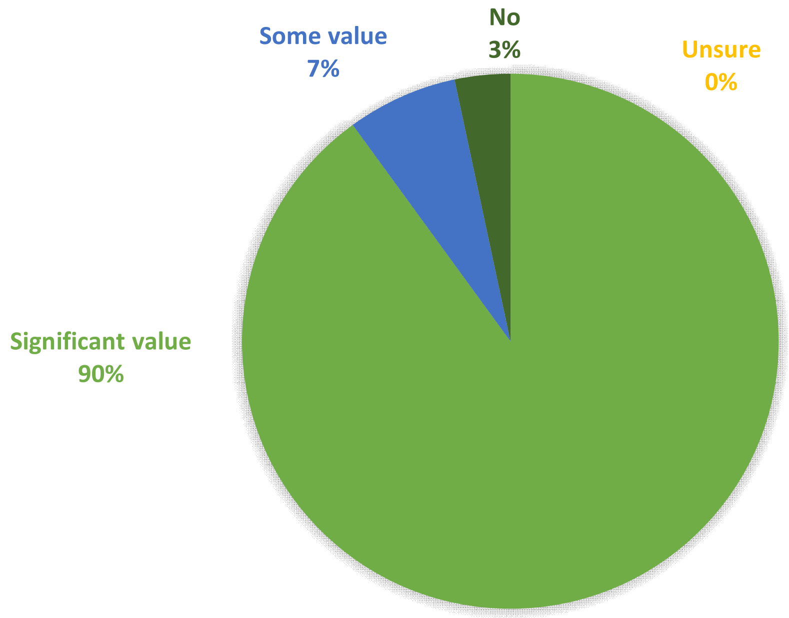
SURVEY

RESULTS

5. DO WE DELIVER ON OUR PROMISES?



6. DO YOU GET VALUE FROM OUR SERVICE?



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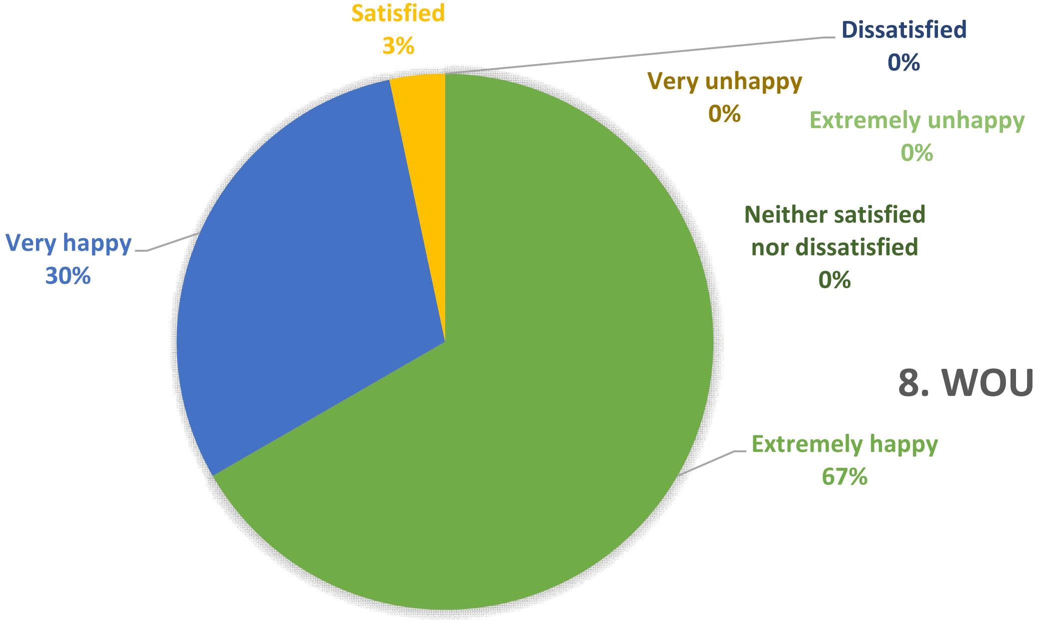
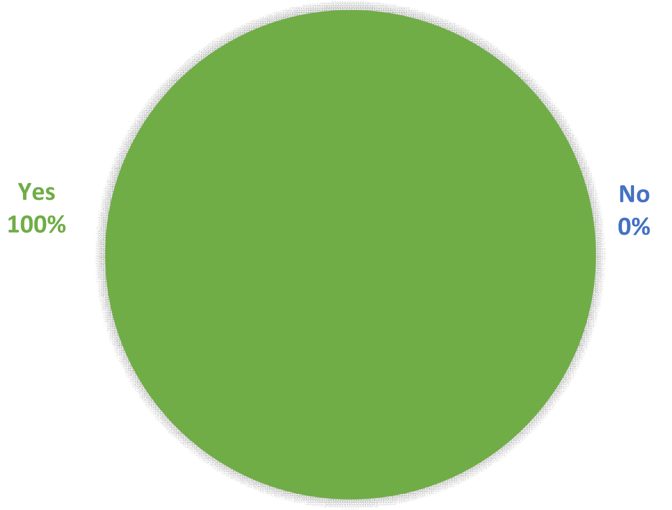
7. HOW SATISFIED ARE YOU WITH OUR SERVICE?



8. WOULD YOU RECOMMEND OUR SERVICE TO A FRIEND?



SURVEY

RESULTS

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WHAT DO WE DO BEST?

What do we do best? Clients had the option to provide written feedback:

“You keep us informed and updated in regard to our investments. You offer face-to-face meetings, which are very helpful.”

“You explain things in simple language.” “You are in regular contact with us.”

“You understand my needs.” “You provide the personal touch and act in our best interests.”

“Information is clear, and the video explaining the financial report is a great idea.”

“You give tailor-made, caring advice, and you’re always ready when I need it.”

You offer a high level of personal service, making me feel valued."

“The professional standards you adopt and the care taken to understand your clients’ needs ensures you give value-added advice. This generates a tremendous amount of trust.”

“Personal contact, regular updates, easy-to-understand advice.”

“You take the time to talk through the client situation in detail, clearly setting out the options and the pros and cons of each. You have a very calm and professional approach combined with a clear knowledge of the industry helps impact confidence that one’s financial situation is being properly cared-for.”

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HOW ARE WE DIFFERENT?

How are we different? Clients had the option to provide written feedback:

“You seem to care and do not take clients for granted.” “You care.”

You provide a very client-oriented service.”

“You make us feel that we matter.”

“You are always available. You offer the personal touch.”

“You manage to be extremely professional and knowledgeable as well as giving a personal service.”

“We never feel rushed to make a decision. The detailed reports and online information is excellent.”

“In my experience, you listen to the client more than other financial planners do and this allows the service to be tailored more closely to the clients’ needs.”

“You take the trouble to get to know your clients personally and then talk to them in language they can understand.”

“The Personal Finance Portal gives clients secure and immediate access to information relating to investments.”

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WHY DID YOU **CHOOSE US?**

Why did you choose us? Clients had the option to provide written feedback:

“You were recommended to us.”

“I knew Dan Woodruff for a long time, and trusted him.”

“I found your website and started with your service before increasing involvement based on satisfaction and performance.”

“I carried out my own research and was comfortable with Dan Woodruff.”

“I knew and trusted Dan Woodruff.” “You were recommended by my sister.”

“You are trustworthy people.” “I was unhappy with my previous advisers.”

“Because when I met Dan Woodruff I could tell the Woodruff Financial Planning would be a cut above all the other Financial Planning companies I had come across.”

“I knew Dan Woodruff from my professional days and thought he was someone we could trust – and we were proved so right.”

“I received a personal recommendation.”

“You were recommended to me by my accountant.”

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WHAT COULD WE DO **BETTER?**

What could we do better?

Clients had the option to provide written feedback: We excluded multiple kind comments where clients stated that nothing came to mind.

"Your marketing material could be more diverse."
Our response: Thank you for your frank appraisal. We take inclusion and diversity seriously, but acknowledge that this may not always be obvious.

We do include subjects from a wide variety of backgrounds in our materials, especially on our website. However, some printed materials have white-only subjects, which we acknowledge may lead you to this conclusion.

We will endeavour to improve the diversity of our materials in future.

"Sometimes annual meetings happen later than we'd expect – not a big thing as we can always ask."
Our response: Our approach is to offer your annual review 12 months after the last one completes. This allows an appropriate period to pass before we review your finances and investments. We start the data gathering process 6 weeks before your annual review is due. Some reviews are delayed because data from product providers or clients does not come back to us straight away. We do offer the chance to have ad-hoc occasional reviews at any stage, as your situation changes, for no additional cost.

We will examine how we can adapt this process to help annual reviews happen more regularly.

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WHAT COULD WE DO **BETTER?**

What could we do better?

Clients had the option to provide written feedback: We excluded multiple kind comments where clients stated that nothing came to mind.

"It seems that a lot of process and analysis is required to complete what a client may consider to be a minor task. This can prevent actions from being taken. With prior agreement of the client it should be possible to complete certain actions without significant process."

Our response: We understand the frustration this issue can cause. Without knowing the specifics, it is difficult to be sure we can answer the point directly. As you know, we answer complex and personal questions. Sometimes, the approach we take may seem to be overly detailed, but we believe that we must be thorough and robust in the advice we give.

Sometimes, what seems to be simple from the outside involves much more than you might think. For example, a "simple" withdrawal from a pension plan involves serious consideration of your options and tax consequences. We must consider what you want to achieve, but also what you might give up as a result of that action.

Also, we operate in a highly regulated profession – some actions are required by our Regulator no matter what clients might want.

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WHAT COULD WE DO

BETTER?

What could we do better?

Clients had the option to provide written feedback: We excluded multiple kind comments where clients stated that nothing came to mind.

"My concern would be cover and succession were Dan Woodruff to be taken ill for a period or incapacitated in some way."

Our response: We are growing the company, and we intend to employ additional advisers in the future when we reach capacity with the current team. We will also add further qualified technicians within the business, who could potentially take over advice roles in the future on a short-term basis.

For now, we have in place a dedicated qualified locum. This is from another local financial planning practice, which operates in a similar way, with similar values to our business. If Dan Woodruff were to be incapacitated the company could continue with this locum slotting into our processes.

We maintain insurance to cover this cost, and retain cash reserves to cope with short-term payments that might be required in this situation.

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Helping you secure your future and live your dreams

CLARITY

Our Prosper service is designed to help you gain complete clarity over your present and future financial positions. We use our planning software to show you realistic scenarios that illustrate the possible effects that future financial decisions and events might have.

This gives you peace of mind and the confidence to start working towards your goals, safe in the knowledge that you will be financially secure along the way.

FOCUS

When you fully understand where you are now, and where you want to be, you will be able to focus on what truly matters to you.
With this knowledge we can then put together a strategic plan to enable you to make your dream future a reality.

With a comprehensive Financial Plan in place, you will take control of your finances and focus on getting to your goals as quickly as possible.

FREEDOM

With your financial Plan in place you can sit back and relax, safe in the knowledge that your money is being looked after by regulated experts with a track record for growth and a genuine dedication to customer care.

With the comfort of knowing that you are covered no matter what happens, you will be free to focus on living the life of your dreams.

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Call us today to book a free financial review
at our offices in Colchester, Essex

☎ 01206 919101

Click below

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Unit 5, Park Lane Business Centre, Park Lane, Langham, Colchester,
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