

ME Financial Services Ltd cashes in on 8x8's affordable but scalable solution



[ME Financial Services Ltd](#) offers a range of financial services including advice on mortgage, protection and insurance products across the UK. The team of eight independent financial experts work from offices throughout the Midlands as well as their main office near Solihull, West Midlands. ME Financial Services Ltd takes pride in working with their clients throughout their financial journeys, their team focusing firmly on offering great client experience and who then go on to become advocates for ME Financial Services.

"8x8 not only provided an excellent customer engagement tool, we made productivity much more streamlined by helping our advisers service clients more efficiently and consistently, wherever they are."
- Marc Dueck, owner at ME Financial Services Ltd

The Challenge: Providing customer engagement you'd bet your house on

Since being founded on October 15, 2018, ME Financial Services Ltd has expanded organically which brought with it the challenge of having a group of brokers working from home across a wide geographical area but without any form of integrated communications.

This posed a number of problems for the organization. Not only were the communication systems a mix of independent mobile phones and legacy office phone systems of various ages, but they were all located at multiple locations on multiple maintenance support agreements and phone line bills. None of the phone systems were interconnected, which meant that transferring customer calls or conferencing team members and finance partners wasn't possible. This had the knock-on effect of a delayed and sub-optimal customer service operation but also delays in business processes as team members would struggle to align for proposals and deal acceptances.

With the challenges of recent years, the situation reached a point where a solution had to be found, especially with the restrictions of COVID making video calls more important than ever

The Solution: Becoming connected and contactable to give customers peace of mind

Independent communications advisors [Cloud Solutions for Business](#) worked with ME Financial Services Ltd to address the growing pains and to define what success would look like.

The new system had to allow for better connectivity and be able to scale but at a fixed cost so the business would be able to understand monthly costs and outgoings to the business.

Crucially, it all had to work effortlessly as if from an office extension and be platform agnostic to reflect the individual usage needs and tools of the people at ME Financial Services Ltd. Additionally, video had to be an option to support this to allow better collaboration and for the advisors to engage personally with clients.

Ultimately, it was a threefold approach that won over the organization. Cloud Solutions for Business' independent review made a compelling argument for 8x8 and when that was backed up by [Gartner reports](#) and other independent customer reviews, 8x8's solution emerged as the clear and obvious company with which to work.

Result: Better productivity, better results, better company

The switch to [8x8 Work](#) has resulted in a number of benefits, including:

- Staff are better connected internally but also externally with clients and customers.
- Local number for each broker providing a reputational and credibility boost with clients
- 8x8 tools have been incredibly reliable and easy to use, allowing for increased productivity
- Improved work-life balance around 1 hour a day of productivity gains since switching to 8x8
- Fixed billing system, making financial planning easier

Marc Dueck, owner at ME Financial Services Ltd said “It worked fantastically. Not only did the integration and training go smoothly, the tools have been fantastic in terms of usability and reliability in terms of delivering a fantastic employee experience but also a strong client experience.”

“The flexibility to work from anywhere and still be “connected” to the office and colleagues means that on average we are saving around one hour a day in productivity terms, which is significantly better for our work-life balance.”

For More Information or Advice:

CALL 0330 6600464

CLICK www.cloudsolutions4biz.com

MAIL enquiries@cloudsolutions4biz.com



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