



**Customer First UK**  
*Limited*

# CASE STUDY



***'Achieving Customer First sends out a strong message to our clients that we are focused on delivering services that make a difference'***

## **Who are you?**

Naylor Wintersgill

## **What is your status?**

Naylor Wintersgill achieved Customer First in March 2005

## **Why go for Customer First?**

- Undertake an objective assessment of how the firm was performing with our clients
- Improve the service delivery to our business clients

## **What were the benefits of assessment?**

- Made staff more aware of the need to identify and deal with the needs of customers
- Identified existing systems and processes that needed revitalising
- Improved efficiency
- Increased team work across the firm

## **What Improvements followed?**

- By achieving Customer First, we can now confidently inform our clients that we are 'More than just accountants' and that through building long-term relationships we are their 'Solution Provider'

## **Contact**

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Photo: The Naylor Wintersgill Team

## More than just accountants – we are a solution provider

Originally established in 1917, with a team today of over 40 people, Naylor Wintersgill has always been proud of the service it provides to clients. In 2005 the firm became the first UK Chartered Accountants to achieve Customer First.

The firm embarked on the Customer First journey to improve service delivery and to create opportunities for differentiation in its broad marketplace through achievement of the Customer First Standard.

The marketplace for accountancy firms is changing and many firms are broadening their service to include general business advice. This has indeed been the case for Naylor Wintersgill, as the firm offers a range of traditional accountancy services alongside business development services with the aim of providing "...commercial advice and assistance to ensure our clients grow and succeed".

It was particularly appropriate for Naylor Wintersgill to review the quality and impact of these services. Alan Wintersgill, Managing Partner said "We wanted to take a step back and ask ourselves what difference are our services making to our clients' business performance?"

As part of the Customer First journey the firm involved a range of staff at all levels and from every department, to ensure a wide spectrum of opinions was gathered.

Working towards achieving Customer First made staff more aware of the need to identify and deal with the needs of clients. Efficiency within the firm has improved both by improving existing systems and by implementing new systems to overcome the shortcomings identified during the assessment.

Alan Wintersgill feels that services have improved as a result of going through the Customer First journey, adding that "Not only did the journey to achieving Customer First give us the opportunity to reflect on the way we do things around here but also it was an opportunity to increase teamwork across the firm".

"We first worked through the 32 Statements within the Customer First Standard individually, identifying those that we felt we comfortably complied with, those where we felt we were nearly there with and those where we felt considerable work was required. From this we devised an action plan and team members assumed responsibility for identifying and implementing requirements to comply with the Statements. The team members were encouraged to involve all members of staff. We had regular team meetings to monitor progress. Some changes were introduced, however there were some existing systems that had become neglected. These were identified and revitalised."

By achieving Customer First Naylor Wintersgill wanted to send out a strong message to their peers – including fellow members of the Institute of Chartered Accountants England and Wales – and clients, that the firm focuses on clients' needs and delivers appropriate services that make a difference.

Alan Wintersgill says "We can now confidently inform our clients that we are 'More than just accountants' and that through building long-term relationships we are their Solution Provider".