FINOVA

How Charleston Financial Services Scaled Specialist Lending with Finova's Broker CRM

charleston financial

Read how Charleston Financial Services transformed its customer retention and reporting capabilities with Finova's Broker CRM—boosting operational efficiency, increasing repeat business to 40%, and simplifying process management with automation and flexible workflows.

40% of business from returning customers

Improved client engagement and lifecycle management

Streamlined operations for 21 staff

Enabled consistent growth and easy scalability

Real-time MI dashboards

Enhanced visibility across the sales pipeline and adviser performance

Introduction

Charleston Financial Services is a specialist finance brokerage established in 2009. With a growing team of 21 staff—comprising advisers, administrators, and compliance professionals—they joined the Pivotal Growth group in 2024. The business operates with a strong focus on tailored processes and operational efficiency, which led them to adopt Finova's Broker CRM.

The challenge

Before adopting Finova's CRM in 2021, Charleston was using an outdated system with limited capabilities.

- **Outdated functionality** – No automation or email integration
- **Lack of lifecycle comms** – Limited tools for client retention beyond initial transactions
- **Inflexibility** – Couldn't adapt the system to fit a specialist brokerage model

"We're a process-driven business, and we needed a CRM that would be an asset, not a hindrance. Finova gave us that flexibility."

- James Hardwick, Managing Director, Charleston Financial Services

"Our old system wasn't evolving. It didn't support automation or tailored communications, which are crucial for a specialist broker like us."

- James Hardwick, Managing Director, Charleston Financial Services

The solution

Charleston adopted Finova's Broker CRM after trialling several platforms. The CRM stood out for its configurability and ability to support both complex workflows and custom automations.

- **Customer retention automation:** Timely SMS and emails from day one to renewal
- **Customisable workflows:** Easily added new fields, documents, and processes in-house
- **Power BI integration:** Created pre-completion dashboards for real-time case tracking

> *"We're doing more business with less effort. Our pipeline is more manageable, and client communication is far more consistent."*
>
> – James Hardwick, Managing Director, Charleston Financial Services

The results

Since implementing the CRM, Charleston has achieved significant improvements in client management and operational oversight:

Increased repeat business
40% of clients now return for new transactions, supported by lifecycle communications

Reduced admin workload
Staff handle more volume with fewer resources thanks to automation and easier data access

Faster insight
Real-time reporting via Power BI helps pre-empt issues and manage performance proactively

> *"I'm not an IT expert, but I can get into the system, build new processes, and deploy changes in an hour. That's a huge strength."*
>
> – James Hardwick, Managing Director, Charleston Financial Services

With a flexible CRM that evolves alongside its business, Charleston is confident in scaling operations further. The team plans to adopt new portal features and looks forward to enhanced email integration in future releases.

Future-proof your brokerage with Finova

See firsthand how our technology can support your business growth.

Book a demo