## FINOVA

# How Q Financial future-proofed its brokerage operations with Finova's Broker CRM



Read how Q Financial transformed its operations with Finova's Broker CRM—reducing admin by two hours per day, increasing year-on-year revenue by 10%, and driving an improved lead conversion rate through streamlined workflows and automated client engagement.

# +2 hours saved per day

Streamlined admin and case management processes

# +10% YoY revenue growth

More efficient operations enabling business expansion

# Improved conversion rate

Enhanced lead tracking and faster client engagement

### Introduction

Q Financial Services is a growing financial services firm offering a full-service brokerage, including mortgages, protection, commercial finance, pensions, investments, and estate planning. With a strong focus on grassroots talent development and delivering end-to-end services under one roof, Q Financial sought a scalable and data-driven solution to support its ambitious growth trajectory.

"Our vision was to do everything under one roof—and to do it well. We wanted to build a company, not just a practice."

Stuart Mackintosh,
Director at Q Financial Services

### The challenge

Before partnering with Finova, Q Financial faced operational inefficiencies and lacked control over its client data. As a member of a network, client information was housed externally, limiting agility and future growth planning.

- Limited data control
  - Client data was stored within a third-party network system
- Manual inefficiencies
  - Reliance on spreadsheets and fragmented admin workflows
- Scalability concerns
  - Existing internal systems couldn't support growing business needs

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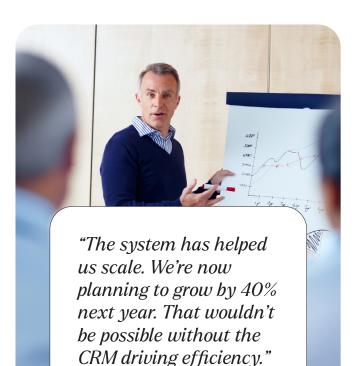
### The solution

Q Financial selected Finova's Broker CRM after a rigorous evaluation of the market. The solution delivered flexibility, scalability, and industryspecific functionality tailored to the needs of financial intermediaries. "We outgrew the system we had built. It became clear we needed a CRM that could grow with us and put us in control of our own data."

Stuart Mackintosh,
Director at Q Financial Services

#### Key features included:

- Automation tools: Introduced automated client messaging and retention marketing
- Custom dashboards: Empowered advisers with individual dashboards to manage daily workflow
- Introducer portal: Provided referral partners with real-time updates and reporting

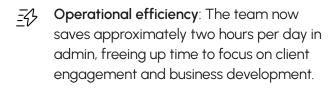


- Stuart Mackintosh,

Director at Q Financial Services

#### The results

Since adopting Finova's Broker CRM, Q Financial has unlocked tangible business improvements:





Accelerated growth: With enhanced data and reporting, Q Financial has achieved a 10% year-on-year revenue increase, and has set a bold target of 40% growth next year.

Through its partnership with Finova, Q Financial continues to enhance adviser performance, deepen client relationships, and scale its business with confidence. The CRM has become a core part of its operations, enabling a <u>future-proof strategy</u> built on data and automation.

### Future-proof your brokerage with Finova

See firsthand how our technology can support your business growth.

Book a demo