

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

The solution

Q Financial selected Finova's Broker CRM after a rigorous evaluation of the market. The solution delivered flexibility, scalability, and industry-specific 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

The results

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



Operational efficiency: The team now saves approximately two hours per day in admin, freeing up time to focus on client engagement and business development.



Stronger retention & conversion: Automated follow-ups have significantly reduced missed opportunities, increasing conversion rates.



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 future-proof strategy built on data and automation.

"The system has helped us scale. We're now planning to grow by 40% next year. That wouldn't be possible without the CRM driving efficiency."

- Stuart Mackintosh,
Director at Q Financial Services

Future-proof your brokerage with Finova

See firsthand how our technology can support your business growth.

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