

How Brewin Dolphin fosters expert client relationships with an FT Group Subscription

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The challenge

Leading UK wealth manager Brewin Dolphin's team of expert investment managers and financial planners must constantly adapt their knowledge of financial issues in order to provide accurate, balanced advice to their clients.

The solution

Through an FT group subscription, all Brewin Dolphin staff have access to a common source of trusted market intelligence, enabling their advisers to complement their experience with valuable real-time insights.

The benefits

Brewin Dolphin's advisers can focus on what clients are saying matters to them most, enabling deeper and more meaningful conversations when helping clients meet their life objectives.



Our FT group subscription enables us to gain commercial and investment market intelligence throughout the organisation, helping us to relate the changing world to the needs of our clients.

Guy Foster
Group head of research, Brewin Dolphin



Investing in relationships

Founded in 1762, Brewin Dolphin is one of the largest investment management houses in the UK. Through their network of over 30 offices, Brewin Dolphin takes a highly personalised approach to investment, which is reflected in their company values - genuine, expert and ambitious.

They emphasise the need to blend their technical expertise with strong relationships in order to tailor financial plans that enable clients to achieve their goals.

Where clients are now often mindful of the economic environment and the impacts on themselves and their families, Brewin Dolphin identified the need to ensure all staff have access to current and trustworthy market analysis in order to stay on the pulse of trends most likely to affect their clients.

A firm-wide client focus

Being client-focused is at the forefront of any successful customer-facing business, but at Brewin Dolphin this is a common thread that ties all their divisions together. "What's absolutely central to us is our clients and their

perceived value of what we do for them," explains Darren Norman, head of dealing. "From the research team, to the investment managers, and to ourselves who transact in the market, we all want to obtain the best value for our clients."

In an environment where industries and economies are subject to a rapid pace of change, it's important that staff keep informed on current issues, firstly to ensure internal teams are on the same page, but crucially to adapt and respond quickly to what matters the most to clients.

Darren Norman outlines the role their FT group subscription plays, commenting "we're all talking the same language about current issues. FT.com provides real value, as we're seeing the commentary and analysis in real-time."

The benefits of digital access across multiple platforms are reinforced by Norman's wider team. Michael D'Arcy, divisional director, uses the FT app on his smartphone to get up to speed on market moves during his commute: "while I'm seated on the train, I can get an instant update on what's happened in Hong Kong and across Asia overnight," he says.



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Head of dealing, Brewin Dolphin



Education-driven expertise

Access to accurate intelligence is crucial in Brewin Dolphin's ongoing drive to promote expertise across the firm, but how best to ensure the value of that information is being maximised?

Through their FT group subscription, Brewin Dolphin enjoys enhanced service levels, including collaboration with an FT account team. The firm was able to partner with their FT customer success manager to organise a groupwide 'Lunch and Learn' event for staff, which included unique access to the FT's Lex writers.

The aims of this initiative were to inspire thought, inform opinion, and help staff effectively navigate the FT content and tools available to them. As noted by Guy Foster, group head of research, "It's one thing to purchase a subscription and put it in the hands of the user, but it's another to educate them on how that's optimised and embedded day-to-day."

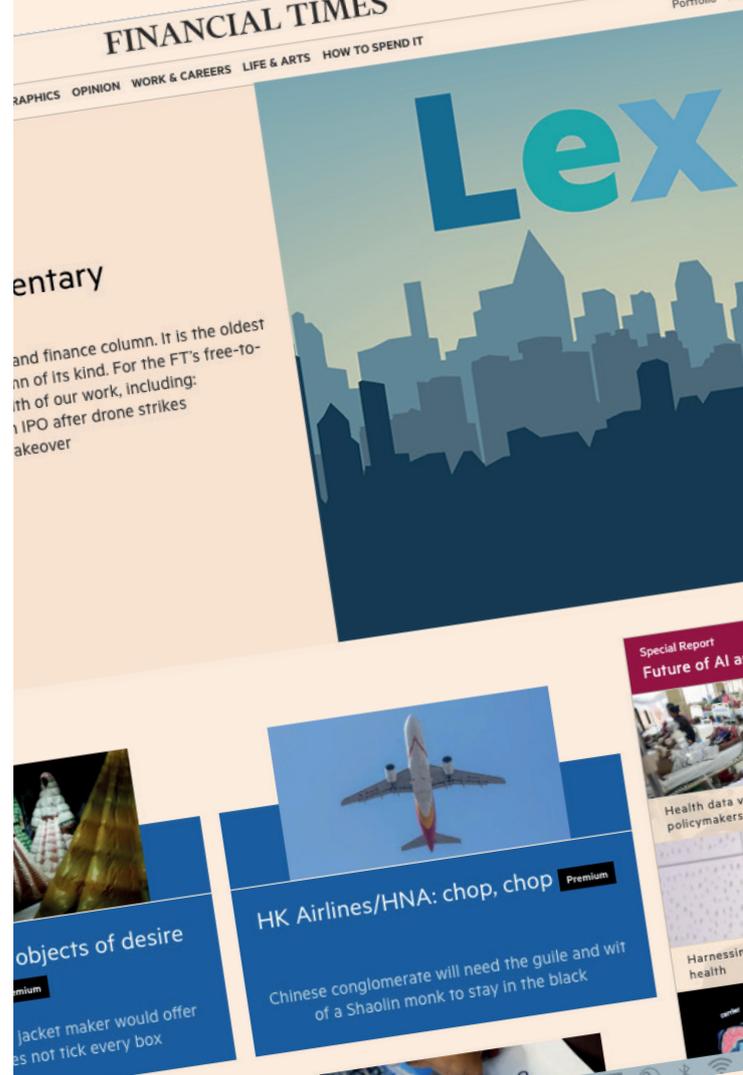
In addition to covering macroeconomic topics, the session provided a behind-the-scenes look at FT Lex, the oldest and most influential column of its kind, as well as an opportunity for Q&A.

The advantages of an FT Group Subscription

Brewin Dolphin benefits from a range of additional services as part of its FT group subscription. In addition to the support and tailored training offered by the FT customer success team, the Enterprise Tools platform helps their administrators easily manage the subscription and access usage data to understand how the FT is being used.

The flexibility of a group subscription provides a cost-effective means of making quality analysis and commentary available to all teams and divisions.

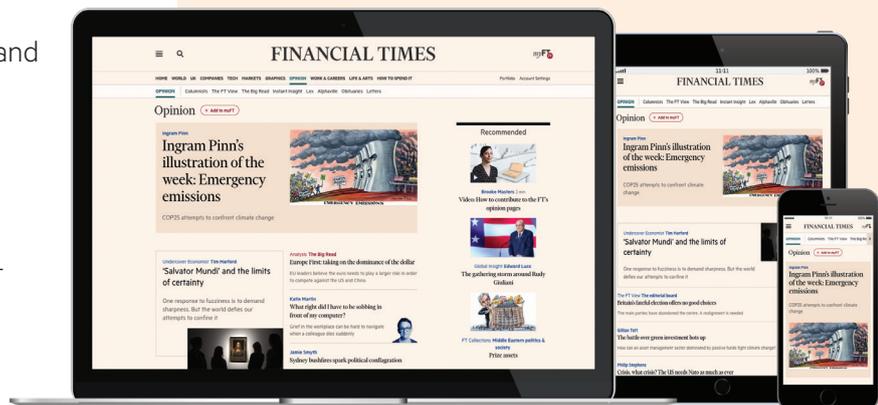
For more information about Brewin Dolphin, visit www.brewin.co.uk



The guidance on how use of the FT can be optimised, coupled with the perspectives of the FT's skilled journalists, made this 'Lunch and Learn' a valuable use of time.

Guy Foster

Group head of research, Brewin Dolphin





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