RISON SOFTWARE
Limited

VIRTLX™ More than an Engagement Platform

Case Study

Finnies Chartered Certified Accountants

Finance – Employee Engagement

finnies
chartered certified accountants

About the client

VIRTLX™
More than an Engagement Platform

Finnies Chartered Certified Accountants – Approachable accountants who care

Achieving the best for their clients is Finnies' priority. Finnies recognise that their clients want to be certain that the best people are looking after their finances. Finnies provide top quality accounting services and business advice to enable success, development and wealth for their clients.

Finnies provide a highly approachable, friendly and professional service which is tailored to their clients' individual needs and the needs of their businesses.

The challenge

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Finnies, based in Beverley – East Riding of Yorkshire, United Kingdom, set out to find a solution that would enable themselves to effectively measure their customer and employee sentiment allowing them to monitor that they are living their values as defined by their value metric which states:

Approachable accountants who care.

Finnies also wished to understand the individual performances of their employees.

Finnies wanted a system that was easy to manage yet quick and easy for their clients and employees to interact with and still deliver meaningful, rich insights through dynamic reporting.

Neil Tomlin – CEO: Finnies Chartered Certified Accountants, and Catherine Ventress – Office Administrator, took responsibility for overseeing the project.

Finding the right partner

Neil and Catherine’s focus was on finding a cloud-based service provider that had a cost-effective platform which allowed for the effective measuring of Finnies’ marketing and human capital functions.

VirtlX was selected for the project.

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The solution

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Richard Chalk, Rison Software Managing Director comments:

“VirtlX Engagement Platform perfectly complements Neil and Catherine’s requirements utilising two of the three elements available on VirtlX Engagement Platform; Perceive and Reflect.

“The Perceive element for monitoring customer experience (CX) and the Reflect element, with its Employee Satisfaction Index for assessing employee sentiment (EX) and its 360° Review for assessing employee performance as seen by the individual, the assigned manager and associated peers, delivers on their specified requirements.

“Our onboard bulk email system also assisted with the rapid-sending of emails to large sets of recipients linking the required survey sets and rated entities for assessment.”

Utilising the VirtlX model allowed the results to highlight areas in the business requiring attention and to also monitor, by department, how aspects of the business are progressing on a month-on-month basis.

The result

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Finnies is easily able to monitor and assess dynamics in the business affecting their customers as well as their employees and act where necessary to resolve issues before they escalate into real problems.

Neil comments:

“VirtlX Engagement Platform helps us to gauge our service levels to our customers and the happiness of our employees. It enables us to have an overall picture of our company allowing us to immediately address any issues raised as well as assisting us in ensuring our employees are satisfied with their work environment, levels of training and general wellbeing.”

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