



# Case Study

## Case Study a Wealth Management Company

### Brief

Verve handled and performed on a complete end to end recruitment process of a wealth management company based in United Kingdom.

### **Verve Communications Pvt. Ltd.**

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## **The Client**

Specialized in corporate pensions and benefits consultancy to the SME market since 1987. The Managing Director is a product of the consultancy ethos of one of the world's largest consulting actuaries, WM Mercer (now Mercer Consulting). He has also worked with some of the largest PLCs including IBM, Lucas Industries, GEC, GlaxoSmithKline and several other high profile clients.

## **The Challenge**

Verve approached by the client to recruit Independent financial advisors with Diploma in Financial planning preferably Pensions qualification which is called the (g60). Handling Corporate business i.e. Blue Chip, Small and medium size companies. The biggest challenge here was building a database of all the IFA's in and around Buckinghamshire. The second most important thing here was getting the right profile by calling each candidate which was wholly passive/headhunting work. As job boards had very little or no relevant data. Statistics revealed that the entire wealth management industry has only 15% IFA's dealing with corporate clients and out of which only 2.5% are located within 30 miles of Amersham.

Another big challenge that was dealt with successfully was the filtering of candidates and getting the right candidates screened and lined up.

## **Verve had to make sure that**

Client communication and transparent information is conveyed to the recruiter. With an absolute advantage of experienced financial recruiters working on the roles.

## **The Solution Reporting**

- Pre-screening Questionnaire.
- Updated CV's
- Conversation reports
- Database with complete information of the candidates (Relevant or Non relevant).
- Minutes of the client calls

## The Results

Initially we had only a few candidates lined up who were getting rejected by the end client on the basis of Salary, less Business development experience. However with effective client communication and applying different strategies to the process i.e. filtering and Zero defect syndrome. We were able to track down the cream.

