

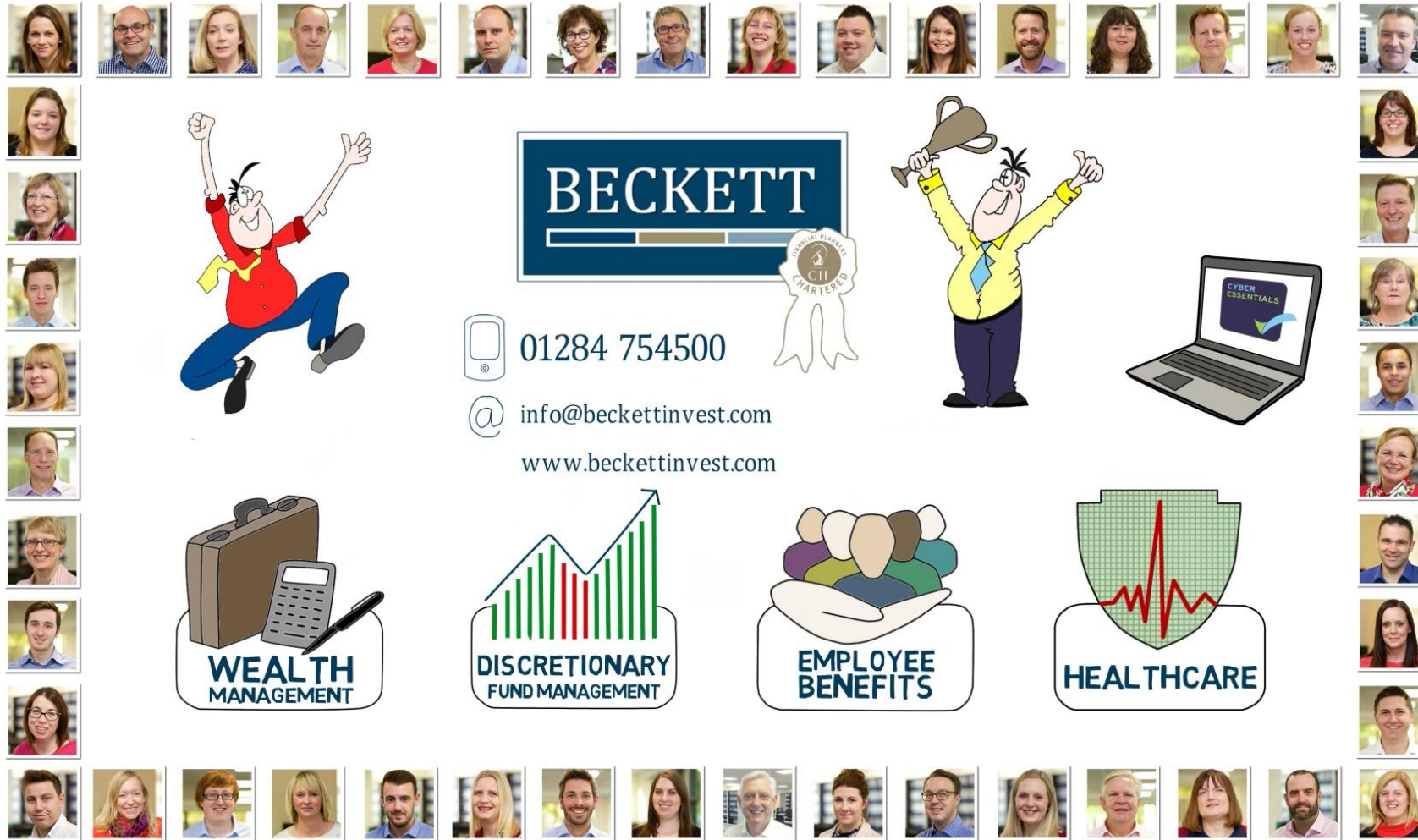
Maintaining Employee Engagement

BECKETT



INVESTMENT MANAGEMENT GROUP

Clarity of Direction



BECKETT

01284 754500
@ info@beckettinvest.com
www.beckettinvest.com

Financial Planner
Chartered CII

CYBER ESSENTIALS

WEALTH MANAGEMENT

DISCRETIONARY FUND MANAGEMENT

EMPLOYEE BENEFITS

HEALTHCARE

BECKETTS



New Model
Adviser

TOP 100

2017
TITANIA

Myth Busting

MYTH

BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

The Beckett Employee Engagement Journey



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

The Vision



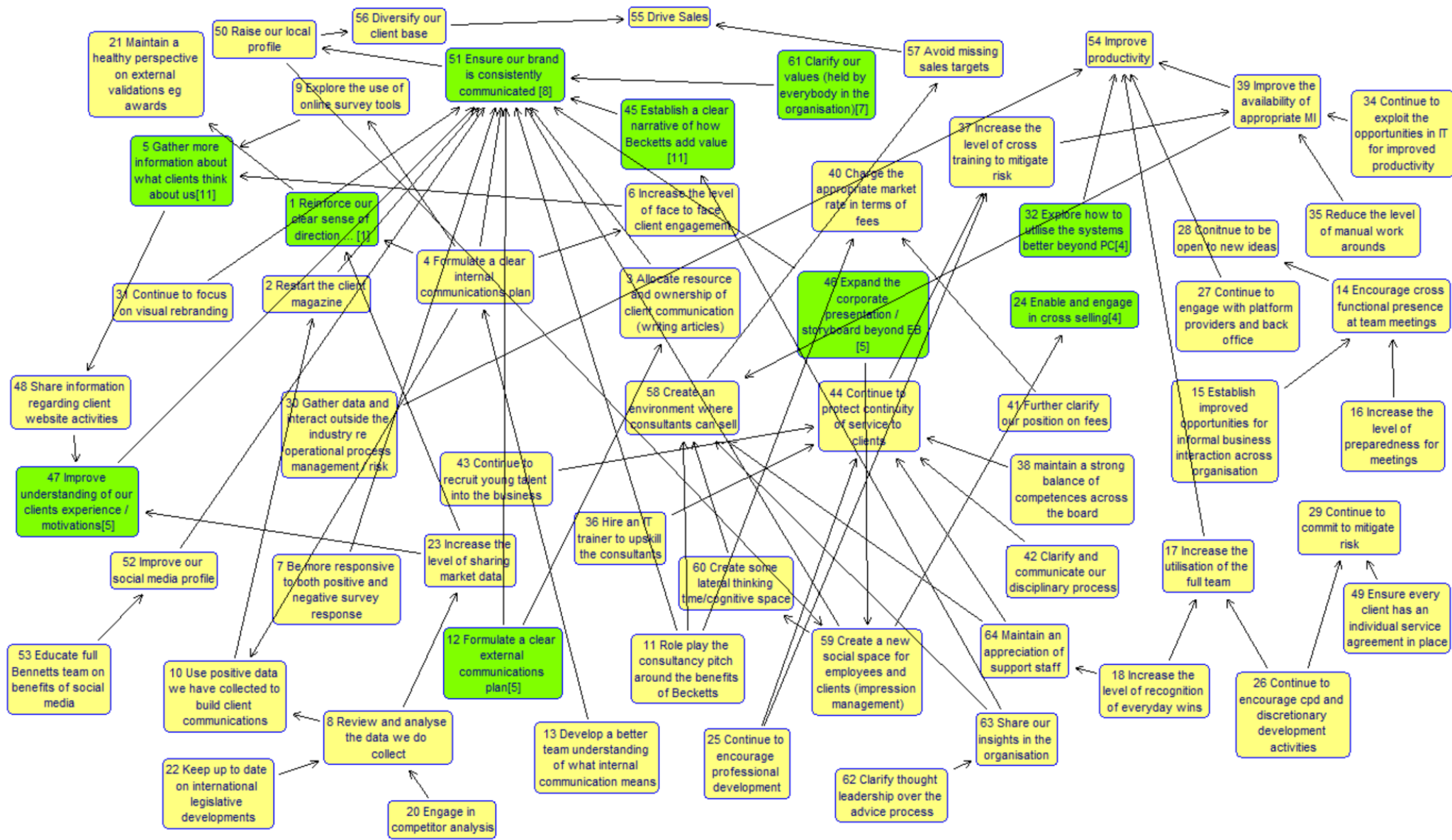
BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS



Suggested idea for action

Nominated priorities
[number of dot votes in square brackets]

Linkages showing cause and effect

Clarity of Direction

Our aspiration in the next 3 years is to become the best in class SME IFA in the UK, an advisor of choice that operates a profitable business with a growing client base. We will have happy clients that continue to be retained whilst we attract the right kind of clients for our business through a well-refined market approach. We will continually improve our offering in line with client needs, delivering service standards which align with client expectations and for which we maintain a fee structure of appropriate market rates.

Our consultants will deliver a consistent message and be confident performers, creating a trusted brand and cementing our reputation for delivering what we say we will deliver. Underpinning our work will be a commonality of purpose across the whole workforce, supporting an engaged work force and growing our position as an employer of choice. We will also continue to serve our customers in a sustainable way by operating at an acceptable level of risk and managing our 'cost to serve', with systems that can cope with increasing client numbers and a flexible and adaptable workforce.

To effectively move us towards these objectives, we will address a set of priority initiatives. We will gather more information about what clients think about us and grow our understanding of our clients experience and motivations. We will establish a clear narrative of how Beckett's adds value whilst retaining a focus on ensuring our brand is consistently communicated. We will formulate a clear external communications plan and expand the corporate presentation/ storyboard beyond EB to all parts of the organisation. We will explore how to utilise the systems beyond PC and when the time is right, enable and engage in cross-selling. As we do this work, we will continue to reinforce our clear sense of direction, leading the business to a successful future.

BECKETTS



Chartered Status

Innovation

Clear Direction

BEST IN CLASS

Employer of Choice

Building On Success

Fun

1

BECKETT TEAM

2 MILES

Efficient Communication

4 MILES

Client Focus

6 MILES

The Best People

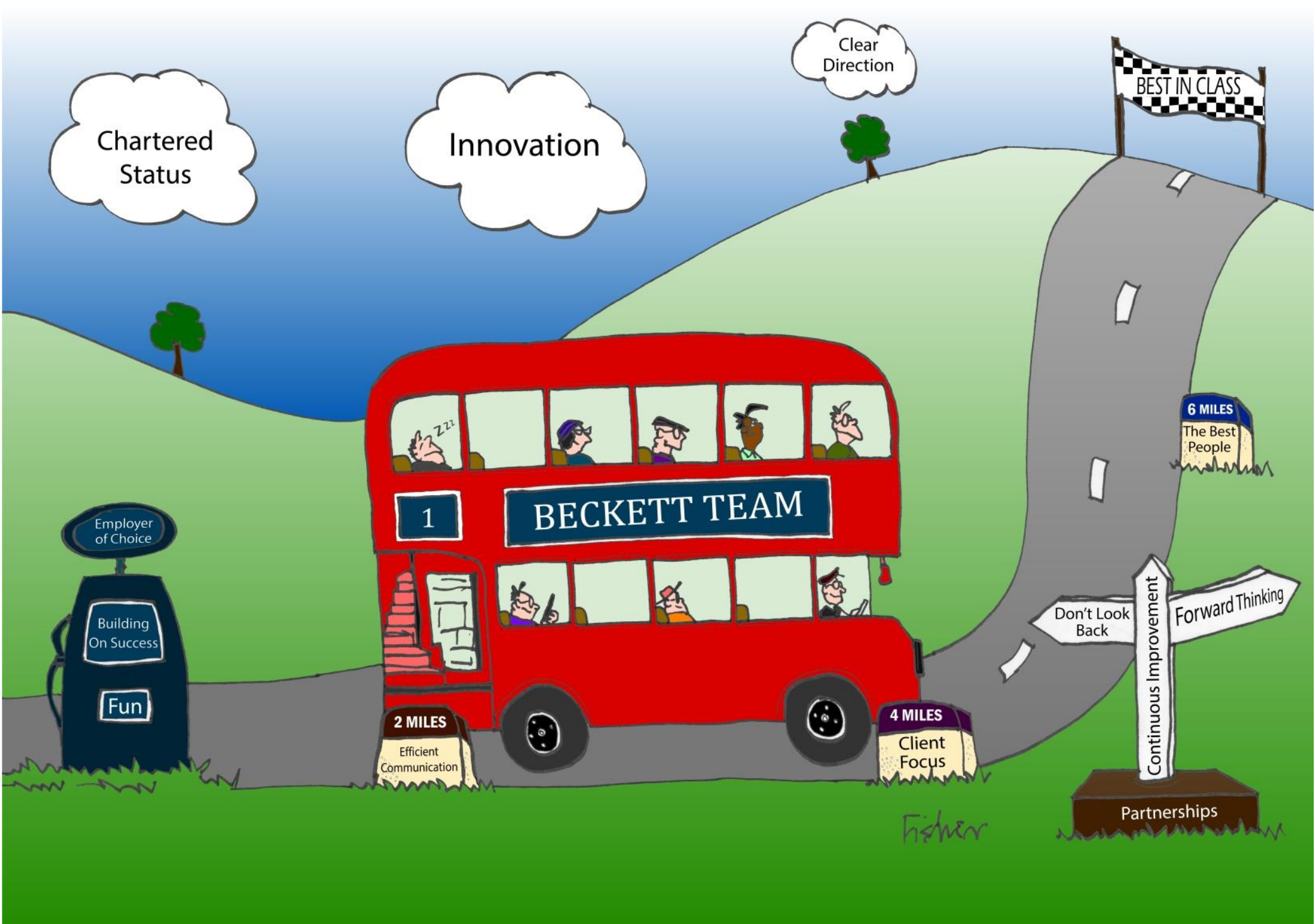
Don't Look Back

Forward Thinking

Continuous Improvement

Partnerships

Fisher



The Team

- Existing Staff



Clarity of Direction

SMART Objectives



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

Objectives to Achieve Best in Class

- Specific
- Measurable
- Attainable
- Realistic
- The same as everybody else

Communications



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

Latest Financial Results



BECKETTS



The Team

- Existing Staff
- Recruitment



The Team

- Existing Staff
- Recruitment
- The First Two Years

BECKETTS



New Model
Adviser

TOP 100

2017
TERRA

Beyond The Basics



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

Beyond The Basics

BECKETT

We Asked You What You Thought. And You Told Us!

Our experience with your company has been nothing like any other financial company we have had dealings with. We like your friendly approach and feel that we can approach you at any time with any worries we may have

I would strongly recommend Beckett's to a friend or colleague

It is a real pleasure to do business with your Healthcare team

You guys have looked after me well for over 20 years

Beckett's are superb, very responsive and supportive

I am impressed with the level of preparation before each review meeting



I rate Beckett's as a good company that employs the sort of people that know their customers and know their fields

The communication newsletters from the team around key developments have been welcome and informative

Quality of service is unparalleled

We have already recommended your company to several friends and family

You have always given excellent support, advice and are completely trusted

The excellent team which looks after our interests are skilled, friendly, and available

BECKETTS



New Model
Adviser

TOP 100

2017
FINTECH

The Biggest Hurdle To Continued Improvement



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

The Biggest Hurdle To Continued Improvement



BECKETTS

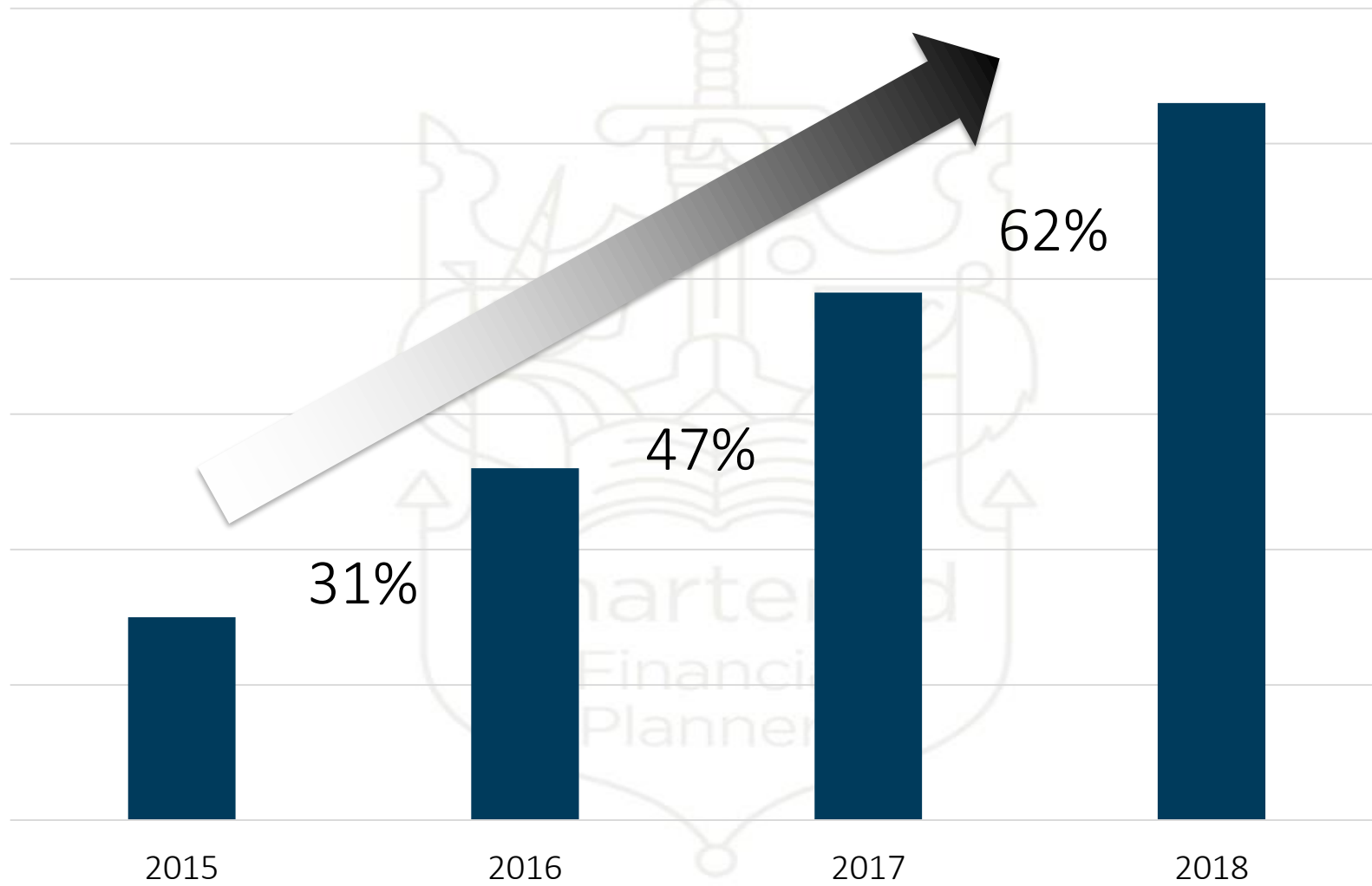


New Model
Adviser

TOP 100

2017
TRENDS

Financial Performance



BECKETTS



How It Looks from the Outside



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

The Reality



BECKETTS

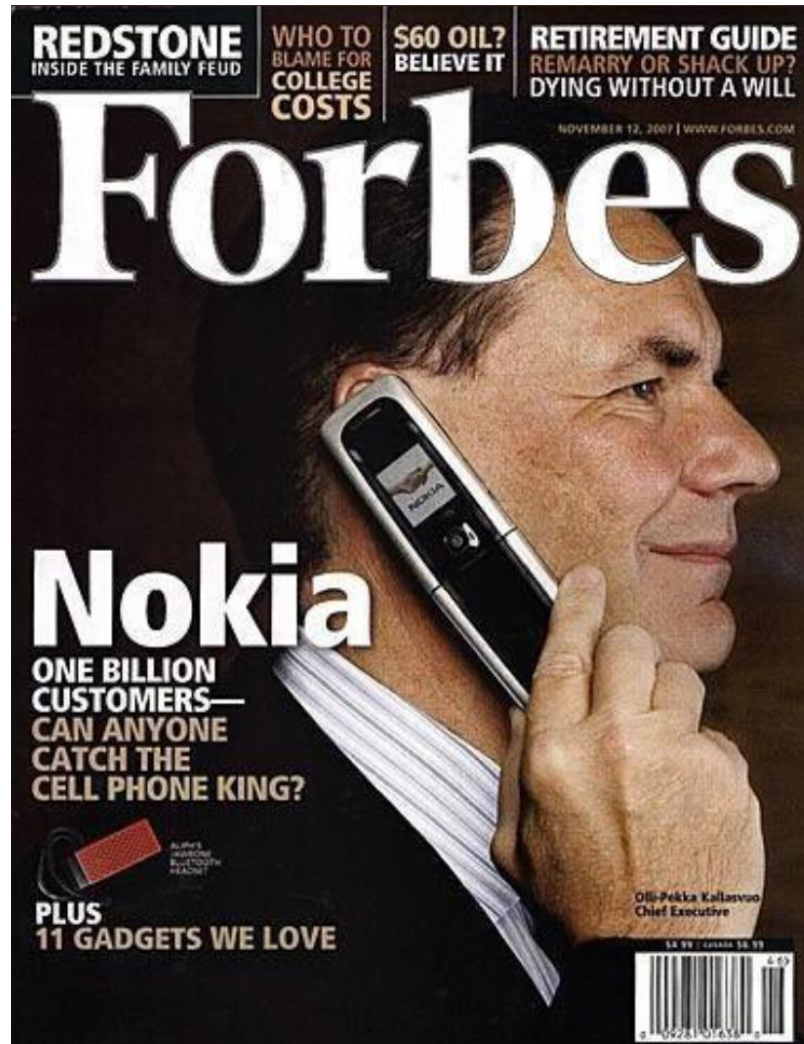


New Model
Adviser

TOP 100

2017
TRENDS

Complacency



BECKETTS



Business of the Year Winner

BUSINESS AWARDS 2017 WINNER

New Model Adviser

TOP 100

2017

Employee Engagement Can Be Measured



BECKETTS



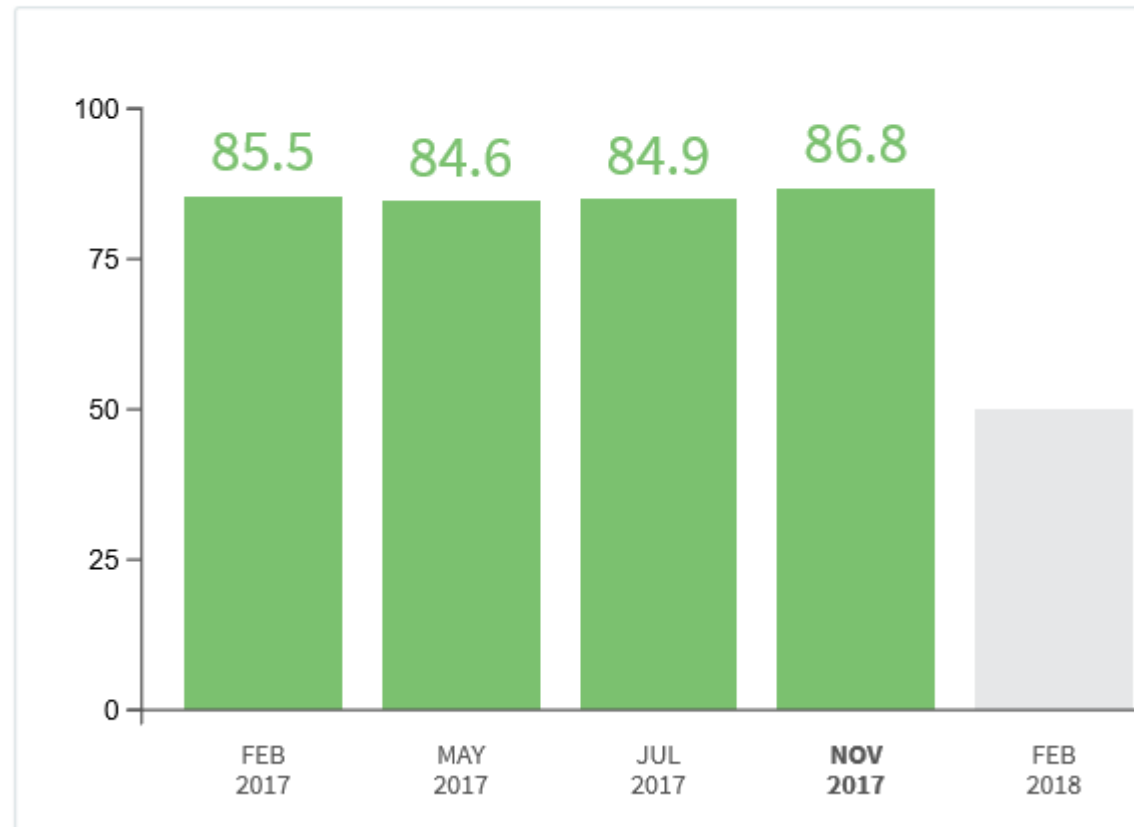
New Model
Adviser

TOP 100

2017
TRENDS

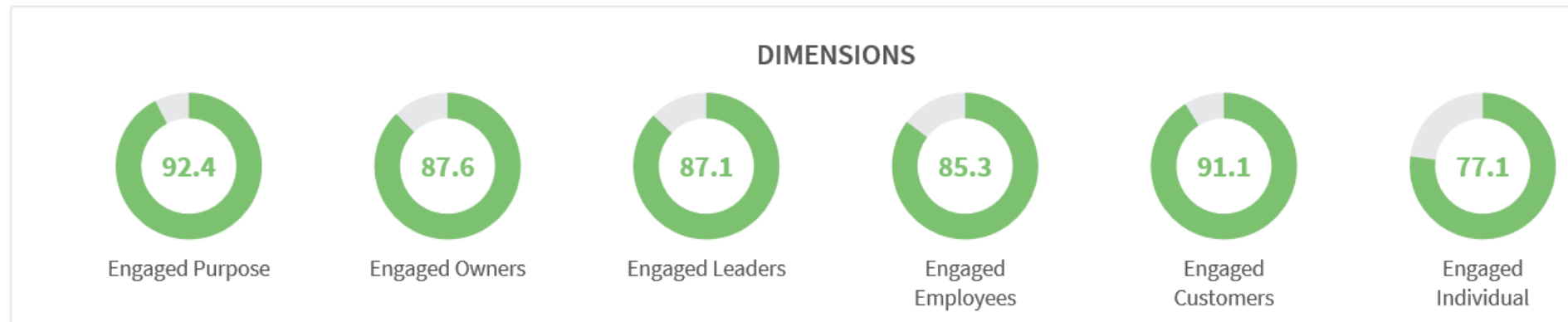
Are the Team Engaged?

ENGAGEMENT SCORES



Are the Team Engaged?

ENGAGEMENT SCORE BREAKDOWNS



Employee Engagement – The Next Challenge



BECKETTS



New Model
Adviser

TOP 100

2017
TRENDS

Women in Finance Charter



- A pledge for gender balance across financial services.
- To be the best businesses in the sector.
- Commits firms to supporting the progression of women into senior roles setting targets and implementing the right strategy for their organisation
- Requires us to publicly report on progress to support the transparency and accountability needed to drive change.

