



## Goodwin Barrett

ConnexAI Platform Implementation

“ The productivity increase since moving to ConnexAI has been huge and the support with any issues is phenomenal. Even when there has been big issues the support team and senior members have done everything possible to get it resolved as quickly as possible. 100% I would make the same choice given the chance again. ”

**Mark Carroll**

Operations Director



Overview

# Goodwin Barrett

Goodwin Barrett is the leading mis-sold investment and pension specialists in the UK. Goodwin Barrett was established in 2008, formerly known as Credit Claims and have a team of ex financial advisers and former bankers helping clients reclaim the money they lost unfairly on investments. This is a high touch business, their financial experts working with clients on complex claims, with many fine details and in a competitive market, this connection is crucial.





## The Challenge

Goodwin Barrett were looking to move away from advertising on traditional media platforms and change the business structure, developing a strategy of outbound marketing, dialling survey data. It quickly became clear that they needed a dialling solution that could help improve their engagement capabilities as well as handle the volume of customer calls that needed to be placed.

## Goals

Top of the list for Goodwin Barrett was to connect with the right clients, to increase sales through the campaign as efficiently as possible. And, to do this with a cost effective solution, in terms of service, set-up, training and maintenance, to get up and running quickly and to avoid the IT overhead of an on-premise solution. Due to the sensitive nature of their business, working with personal financial details, the security of the solution was also a priority.

## The Solution

Goodwin Barrett selected the ConnexAI platform as the perfect fit due to an easy to use, secure, cloud based solution, that was able to be quickly deliver value to their business. Aside from the core features of the platform, like dashboarding, reporting and coordinating the contacts, Goodwin Barrett have found that the Gamify functionality has delivered met the needs for advisor engagement.

“The results have been monumental since moving to ConnexAI and we couldn't have hoped for it to be any better.”

**Mark Carroll**  
Operations Director







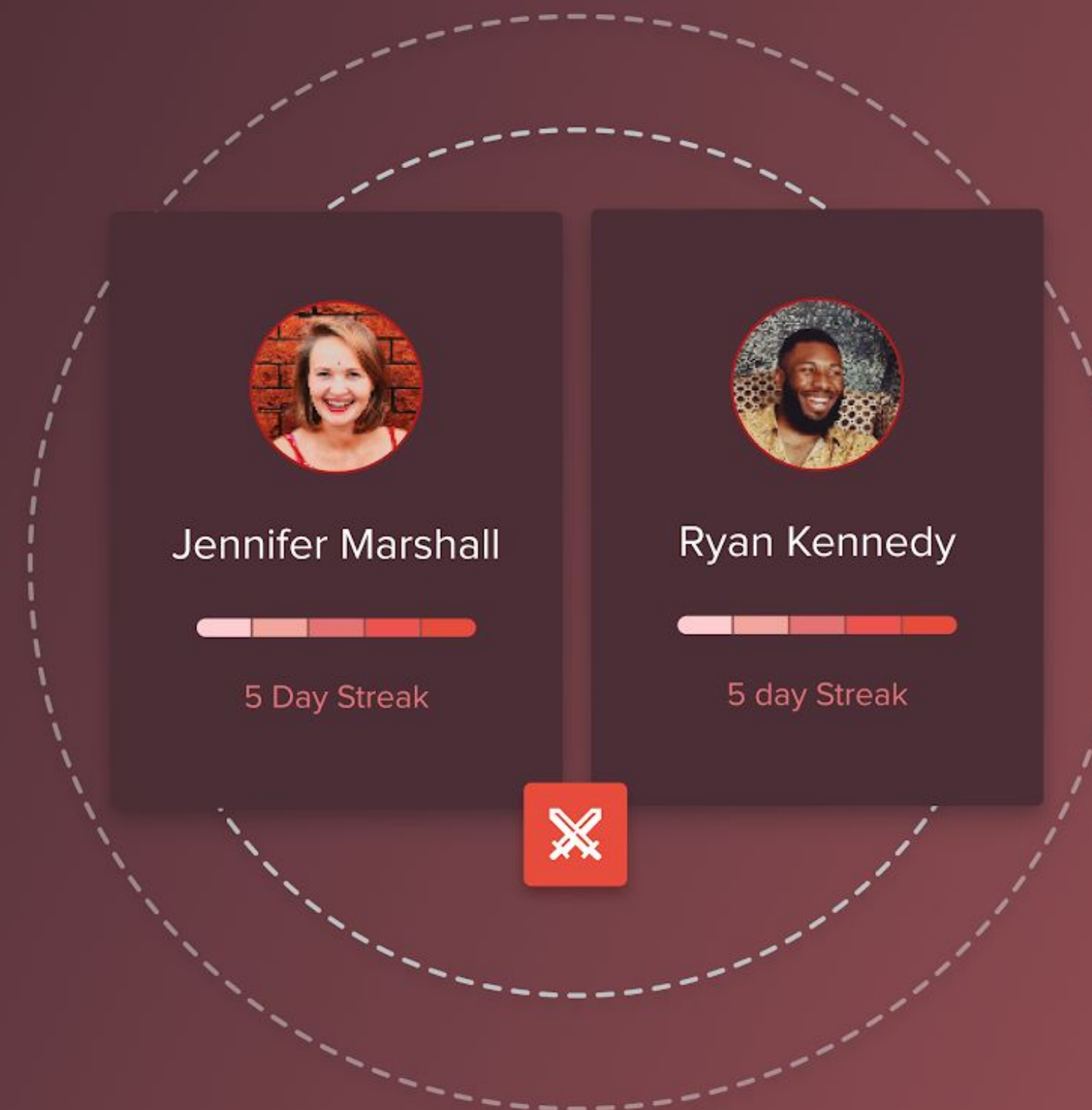
“ Gamify is a small change that has packed an unexpected punch for our contact centre. ”












**Kiel Malpass**  
Senior IT Support



## The Results

- **Increased sales** - The primary business need of increased sales was met, especially following the implementation of Gamify.
- **Reduced costs** - Being cloud based and easily scaled to meet their needs, ConnexAI removed the need for onsite infrastructure, reducing costs and on-going maintenance.
- **Rapid time to value** - Through the simplicity of the interface and extensive functionality all of their advisers were quickly engaged and up to speed with the system requiring very little training.
- **Secure** - With it's ISO accreditation and adherence to data and infrastructure data standards ConnexAI was able to satisfy their stringent security needs.
- **Cost effective** - Simple pricing, a free trial and low maintenance costs meant the commercial relationship was quickly established.
- **A partnership** - The ongoing support and constant platform updates has led to a 5 year partnership between Goodwin Barrett and ConnexAI.



Leaderboard	
1	  Savannah Nguyen 545,500 
2	 Kristin Watson 541,020 
3	 Devon Lane 541,020 
4	 Darlene Robertson 541,020 
5	 Bessie Cooper 541,020 



## The ConnexAI Platform

The ConnexAI Customer Engagement platform enables interactive sales support and customer service on a variety of channels through a secure, cloud based, omnichannel engine, efficiently orchestrating each conversation and the agents that respond.





## The ConnexAI Platform

### 14 million interactions per day

The ConnexAI Customer Engagement platform handles over 14 million interactions per day worldwide.

### Increase in sales

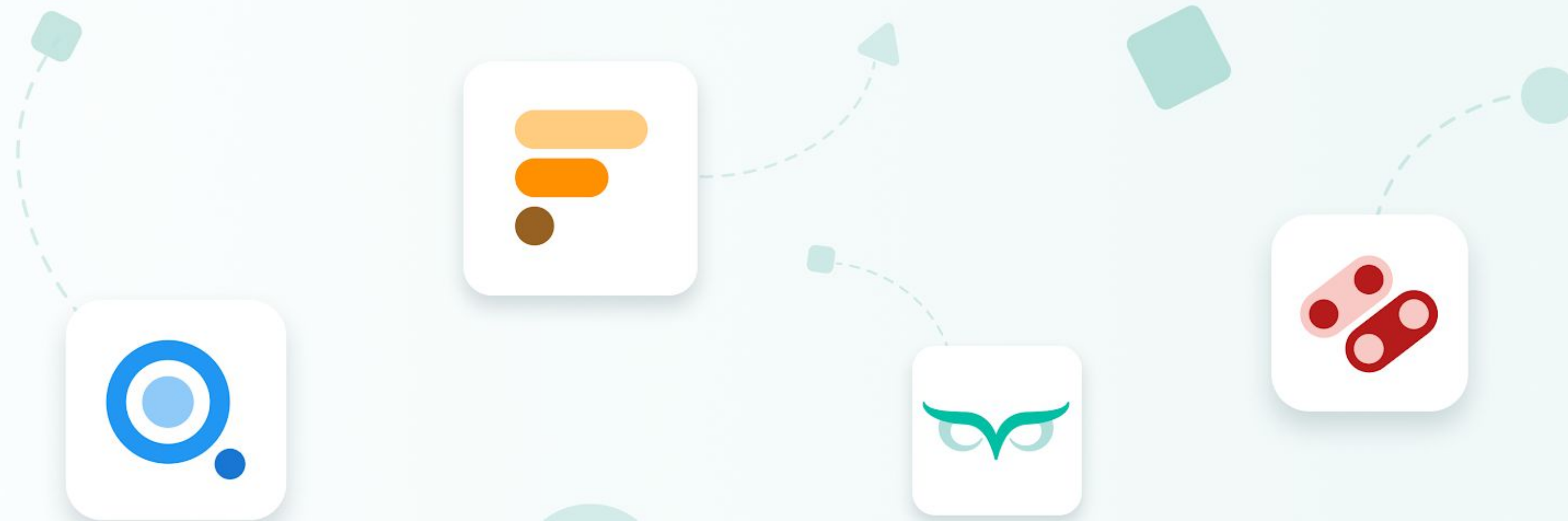
Our clients have seen a 25% increase in sales within the first 4 weeks of using the platform.

### Team performance

Our clients have seen a 33% increase in sales team performance with the implementation of Gamify through our platform

### Satisfaction rate

We pride ourselves on providing high levels of customer service and that's why we have received a 91% satisfaction rate from our clients.







To learn more about how ConnexAI  
is helping businesses to  
overhaul their customer journeys

**0333 344 2435 | Bauhaus 27, Quay St, Manchester M3 4AW**

**hello@connex.ai | connex.ai**