

Case Study



Independent Financial Advisers

Introduction

Bentley Independent Financial Advisers was established in 1990 by Brian Sneyd, who built its reputation on the provision of high-quality financial advice to individuals and corporate clients.

Sam Sneyd joined the company six years ago and between them they have over 60 years' experience in financial services, including pensions, investments, inheritance planning, and mortgages.

Having updated their internal systems, Bentley approached Clickingmad wanting to develop, not just a new website, but a digital strategy, which has become increasingly important in their industry.



Project Overview

Bentley Independent Financial Advisers needed a restructured website to organise the vast amount of in-depth, complex financial information in a simple, user-friendly format.



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Their previous site was outdated, difficult to update, overloaded with content, performing badly in search engines, and stalling when users viewed too many pages too quickly.

In a sector where trust and professionalism are everything, it was essential to deliver a site that gave users confidence in the brand and the team; enough to pick up the phone and invite them into their homes to discuss personal financial matters.

It was also important to communicate effectively with companies looking for corporate financial services. This audience warranted its own space on the site, so users could navigate to the right section easily.

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Solution

Bentley needed more than just a nice redesign. We began the project with a detailed audit of the information and worked with the team to develop a site structure and content strategy that would greatly enhance the user journey.

As financial services websites can often be intimidating, with heavy, technical content, the intention was to simplify the overall experience by streamlining every element, from the design and content to the navigation and usability.

Text was translated into plain English and broken down into bite-sized snippets of information and key facts to encourage users to find out more. PDF documents then formed the bedrock, to cover the more in-depth information, for people to print off, read and digest.

Bentley has an established and recognisable brand, with a classic colour palette of dark green and gold. They wanted a modern, approachable and friendly feel to their new site that would be more appealing to their target audiences.

Our approach to the design was to carve out defined sections with the use of bright, bold colour for each, not only giving users a warm welcome and injecting more vibrancy, but helping them to navigate the site visually.

The full-width layout worked well, creating a sense of openness and allowing for plenty of high-quality images and white space to generate impact. Long, wordy titles and well-populated menus, led us to opt for in-page navigation instead of drop-down menus that would confuse users and diminish the striking homepage.

The client's wish list also included online calculators for pensions and savings planning. We needed to bring third-party generated tools on-board, and shape them to blend seamlessly into the Bentley site.

With customer engagement a high priority, a WordPress blog was integrated into the site to make it easy for site administrators to update regularly and improve trust-building through stronger communications.

Clickingmad spent time with the team, showing them how to blog effectively by using keywords, relevant titles and rich content to drive SEO. They appreciated the value of timely, meaningful blogging to disseminate key messages and the latest financial news.

Fired up to bolster user engagement, Bentley took Clickingmad's advice to put together real-life case studies that people could relate to, by showcasing their services and the solutions they provide for their clients.

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“The main thing is the support we received throughout the process.

The team at Clickingmad were extremely professional, always getting back to us quickly and giving us a high level of customer service.

Their excellent support is ongoing and I wouldn't hesitate in recommending them.”

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Services Provided

- Graphic Design
- Custom Joomla CMS
- Mobile Accessibility
- UX User Experience Design
- Photography
- WordPress Blog
- SEO & Analytics



Outcome

The client described their new website in three words – professional, simple and engaging. In particular, they liked the welcoming team page and the power of the blog section. The success of the site comes down to a much smoother experience that enables users to navigate the wealth of information available in a more intuitive way.

We set out to create a website that was equally informative as it was engaging, and by working closely with the client, we were able to deliver a distinct online presence with a great deal of personality and smart functionality.

The advanced new site has already generated some brand-new clients for the company and plans are firmly in place to develop this valued resource even further.

Next on the list is a portal, where clients will be able to log in to check how their plans are performing. Greater interactivity is also on the cards, as Bentley moves towards building a database of subscribers to enable them to send out links to relevant blog items.

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www.independentfinancial-advisor.co.uk