



Triumph with dictation

for Financial Services Firm: S & K Berry Associates

Site Profile:

- Established in 2004
- Based in Leeds, West Yorkshire
- Specializes in holistic financial wellbeing

Challenge

- Manual typing was taking its effect on the team
- The firm wanted a more efficient way to pass on work

Results

- Wscribe digital dictation was deployed across the business
- The team were able to continue providing “excellent multi-generational client service”
- They achieved an improved, more efficient way of working

Background

Established in 2004, S & K Berry Associates Ltd (S&K Berry) are valued partners of wealth management giants and experts: St James's Place.

With various partners all over the country, St James's Place are one of the most trusted in the industry and VoicePower Ltd have the privilege of working with many of them.

S & K Berry pride themselves on providing extremely valuable financial advice to their customers.

The firm specialises in holistic financial well-being to people wishing to build or preserve wealth, manage cash and borrowings, and gain financial protection.

Furthermore, S & K Berry pride themselves on offering a personalised service aiming to keep clients up to date with the financial services market.

The Burden of Manual Typing

Before approaching workflow and speech technology experts VoicePower Ltd, S & K Berry were using a very old school approach to tackle their workload.



S & K Berry Associates Ltd

Holistic Intergenerational Wealth Management



Like many other businesses, S & K Berry were typing all of their documentation manually, including emails, reports and much more.

Being extremely time-consuming, manual typing took up a lot of their employees working day.

Furthermore, it can often prohibit businesses from achieving a quick turnaround time with client communication.

Due to the volume of documentation that firms like S & K Berry have to create every day and their deadlines, manual typing leaves room for errors and mistakes.

Ultimately, S & K Berry had enough and decided that needed a better process; That's when they approached VoicePower Ltd.

Embracing Digital Transformation

S & K Berry knew that they needed a system that provided dictation for financial services, but where to start?

Luckily, VoicePower have been providing speech technology consultancy for over 20 years and offer a range of dictation solutions.

The VoicePower team took the time to understand their client's goals and objectives and only then could they advise a solution based on their requirements.

During the consultation phase, VoicePower spent time with S & K Berry considering their IT infrastructure, the way their employees work and much more in order to get an in-depth understanding of the firm.

After careful consideration, the speech technology experts recommended that Winscribe Dictation was the most suitable solution.

What is Winscribe Dictation Software?

Winscribe is a highly intelligence dictation system that would allow the firm to allocate authors and typists within its system.

The authors (A.k.a advisors) can then send dictations off to be typed by secretarial/admin staff, allowing the advisors to focus on providing a better service.

As Imogen explains:

"Instructions are dictated from the Adviser for the office to action."

Not only does Winscribe speed up the document creation process, leading to a quicker and more efficient client experience, but it also allows for more detailed reporting.

How? Well, this is because the author can speak their notes, making it easier to go into detail about the topic in hand.

Furthermore, Winscribe is perfect dictation for financial services as it allows for instant sending of dictations, meaning a steady flow of work jobs rather than a scenario in which all jobs come through at once.

A New Way of Working

Winscribe got the seal of approval from Marketing & Events Assistant, Imogen Berry, as she confirmed:

"Winscribe is an efficient way to get work passed on."

The financial services firm currently has one author: Director, Stuart Berry, who is creating the dictations using the Winscribe Mobility smartphone app.

Additionally, they have a team of 8 typists who type up the dictation into a tangible document.

Through being able to dictate the audio files sent from Stuart in a timely manner, the office team are able to perform tasks more efficiently making the team more productive and therefore, giving everyone more time to focus on an all-round good client experience.