

Customer Success

What do we do and why do we do it?

The Customer Success team exists to ensure that Defaqto's customers get the most value possible from the all the products and services we provide to them.

We train people to use our software products, make them aware of new functionality as it becomes available and provide ongoing support for them.

We deal with all types of customer query regarding our software, our data and our Ratings / Mappings and follow through on any issues to ensure they are resolved in a timely manner.

We also support the testing of our software and provide feedback to help develop our software further.

How are we organised?

The Customer Success team consists of 10 people.

The **Head of Customer Success** leads and manages the team.

The **Customer Support Team Leader** and three **Customer Support Consultants** primarily answer calls and respond to emails from customers (mainly financial advisers). They answer queries where they can, speak to relevant contacts internally to investigate issues and work with our IT Operations team to solve technical problems.

Our **Customer Success Executives** work with our larger customers (including both financial product providers and large firms, or networks, of financial advisers) to provide face-to-face and telephone-based training on the full range of our software products, and also our Ratings. They also work with our customers to promote increased usage of our products and services.

Our three **Training Executives** focus on providing telephone-based training on our software to smaller firms of financial advisers.

Who do we work with?

Internally, we work most closely with IT Operations (for technical queries), Research (for data-related queries), Sales and Marketing.

We obviously also work with all types of customer. This can include large financial institutions such as Banks, Insurers and Fund Managers, plus large firms of financial advisers, financial adviser networks and smaller advisory firms.

What's it like to work in our team?

We are a fast-paced team and each day brings new challenges. It can be very busy, especially when phone traffic is high, but it is an enjoyable environment that relies on team work and good communication.

We all love learning and that's critical to keeping up to date with the full range of financial product data and software tools we provide to our customers.

Our team has a strong customer focus and we work hard together to ensure we support our customers in an efficient and timely manner.