

Case Study

Background:

Fee protection insurance protects businesses in the event of them receiving an enquiry by HMRC, by covering some or all the fees incurred by their accountants whilst representing them and conducting work related to that enquiry.

CCH Fee Protection were pioneers of fee protection insurance over 20 years ago. They are a division of Wolters Kluwer (UK) Ltd, the largest service provider to the tax & accountancy professions in the UK. Their policy has been refined over these years and now provides a number of benefits that their competitors don't offer. CCH's clients are the accountants who then offer the insurance to their clients. There are many benefits for the accountants and it is in their interest to enrol as many of their clients into the scheme as possible.

CCH share their fabulous premises in Hinckley with another part of the group, Croner Consulting and between them they share a team of up to 6 technical Tax consultants, 20 highly experienced Tax & VAT specialists and up to 60 Business law consultants who provide a range of services to the accountants and their clients.

The problem:

Their competitors, of which there are an increasing number, **appear** to offer a very similar value proposition. Their competitors' sales forces also boast of help-lines that will provide accountants with a similar level of support, a solid policy that includes everything that the accountants and their clients need and premiums that often appear less expensive. This potentially placed CCH's renewal business at risk and made it more difficult to secure new business.

CCH hold regular open days and with very few exceptions, those that do attend are incredibly impressed, they not only appreciate the scale of the operation and support available to them, they witness first hand the quality of that support. However each open day can only cater for about 20 clients or potential clients, and there are only a limited number of accountants who would be willing to travel to Hinckley.

Many accountants feel uncomfortable about selling insurance on to their clients and many who are keen to, are simply not very good at it. Yet ideally, every client would be in the scheme.

The Solution:

Their marketing Manager recognised that in order to support the sales team and safeguard existing clients, CCH needed to address these concerns. It was clearly impractical to bring all of their clients and prospects to Hinckley so they needed to take the business to them.

We worked closely with CCH's Sales and Marketing teams to capture their value proposition in a series of videos that could be e-mailed via a link to existing and

potential new clients. This needed to include all their FABs, USPs, technical support, and endorsements. It was also important that videos could be presented from a laptop by their sales team.

We then worked with CCH’s marketing department to produce a video for the benefit of CCHs clients, the accountants. The idea was that this could be placed on the accountants’ websites then, should the accountants prefer, rather than sell the concept themselves they could simply direct their clients to their website or e-mail a link.

We created an online working document that could be accessed by both CCH and ourselves. As CCH entered the details of their clients along with the appropriate instructions, our technical team liaised with the accountants and their web designers to either facilitate the inclusion of the video within the website or, for those accountants who did not have a website, to produce a web page incorporating the video and the accountants’ contact details.

This pioneering marketing approach has been a terrific success.

“This has been an incredibly exciting project for us. CCH Fee Protection provides outstanding value and the support that we are able to provide to our accountants and their clients really is unrivalled, however getting that message across with words alone has not always been easy. These videos provide a tour of our business and leave viewers feeling much the same way as do those that are able to visit us, that is reassured and impressed. The Dragontree tv team are a great bunch of people to work with, real innovators!!” - Tori Moreton – Marketing Manager of CCH Fee Protection

