



Will Writing Firm of the Year - Regional

The Will writing and estate planning sector has many fantastic small businesses providing technical and service excellence in their locality. The Will Writing Firm of the Year - Regional recognises smaller teams of less than 20 staff (including support staff) who are the heartbeat of the will writing community and who predominantly offer a face-to-face or video service for clients.

The winner of this award will demonstrate all round excellence within the practice area of Wills, Probate and Estate Management; combining high levels of skills and technical ability with exceptional client service and business acumen.

The winning submission will also outline how the organisation delivers service excellence uniformly across the business ensuring the client is placed at heart of the experience with robust risk management and an effective client and referrer engagement strategy across the spectrum of estate planning products and services.

Criteria

The winner of this award will:

- demonstrate extensive development and progress as a Will Writing firm within the last year, including, but not limited to: strategy, growth, financial performance, technology and innovation, employee onboarding and development, diversity, and training.
- demonstrate how a culture of excellence creates a balance between purpose and profit with demonstrable firm-wide adoption and buy-in; which in turn ensures staff are operating in the best interests of the client and the profession.
- evidence innovation in employee support (both professionally and personally) with a proactive approach to training, mental health and wellbeing, equality, diversity and inclusivity, alongside bravery in managing workloads and fee setting.
- demonstrate a clear approach to technology, IT security and cyber-crime prevention

Where possible, provide evidence of reviews/recognition/ testimonials/recommendations.

Firms will be asked to submit details of their website, reviews and social media channels for consideration as part of the judging process.