



## Intro

We are delighted to present our company for your consideration in the areas of ad-hoc marketing and regulatory compliance support, niche projects and in the provision of ongoing support.

Firstly, we would like to thank you for taking the time to consider your needs further and for looking at the services of LS Consultancy. It is our belief that any successful company operating requires an attentive, supporting and active response consultancy service.

In the difficult market environment, it is vital to have consultants able to provide a high-quality service through: thorough understanding of industry risks and issues you face; detailed knowledge of the ever-evolving environment the increasing changes to regulatory expectations and business standards; championing best but pragmatic, cost-effective practice and being a catalyst for improvements to your growing business; and dealing effectively and efficiently with any work required.

Undoubtedly you need consultants that are appropriate for tomorrow's environment. You require a firm with not only variable skills and experience in several industries, but also the capacity to deliver seamless support services that match your requirements.

LS Consultancy has built its business by concentrating on developing expertise in specific industry sectors. Our success is based on client relationships that last, built on transparency, technical expertise and, most importantly, adding commercial value through the work we do for our clients. We continually develop our services to meet clients' needs.

We believe that LS Consultancy is well placed to meet your requirements. Indeed, we would be delighted to act for you. Any proposal we provide, therefore, will set out how we will work in partnership with you, our services and the associated costs. We believe we offer you the information you will need to feel confident in choosing LS Consultancy. However, if you would like more information please do not hesitate to get in touch.



## **Our Team is headed by:**



Christopher Hall: [chris@LSCPROM.co.uk](mailto:chris@LSCPROM.co.uk)

Chris has a wealth of experience working within the compliance arena. He is a popular expert speaker on compliance marketing and has extensive knowledge in financial services.

Chris was one of the key instigators of the Financial Promotions Discussion group, and uses his knowledge and insight built up through his career to make key contributions to the discussion topics. Experience which spans across many sectors including banking, life insurance, accident and health insurance, retirement planning, wealth management, investment management, mortgages and consumer credit.

He is pragmatic and practical, and stays positive even when things get challenging. Best of all, he treads a great balance between protecting the business and doing what's right for the customer.

## **Our Service Team**

Key to providing you with the kind of service you deserve are the relationships formed, at all levels, between our people and yours.

Our philosophy when working with clients is to make sure that their needs are our priority and it is this principle which will form the basis of our relationship.

Our specialist team has an in-depth understanding of many sectors and would prove crucial for any future determinations you may have to make.



## Services

We offer a number of distinct products and services which can be deployed individually or combined to form a broader solution.

When you face business or regulatory challenges, we provide solutions that are tailor-made to your needs with a view to releasing your energies to focus on your clients.

Our services include:

- Accountancy
- Anti Money Laundering
- Copy Advice
- Compliance support
- Graphic Design
- Marketing support
- Social Media support
- Virtual support

Additional services below are not covered in this guide and are not exhaustive.

- Automated approval processes
- Digital marketing planning & Delivery
- Management Consultancy
- Business development
- Stakeholder management
- Developing products and services
- Drafting internal procedures, processes and other material
- Business & marketing strategy

We work both within individual teams and across many departments to offer a complete solution, with a range of cost effective, compliance and marketing solutions which are uniquely suited to supporting firms.



## Partnering with you

Below we provide an overview of the services we will provide. We can provide fixed price project fees if you prefer.

LS Consultancy can be available, should you wish to engage us, to provide regular ongoing support and advice.

We can conduct on-site support on a monthly, quarterly or six- monthly basis, in accordance with your requirements, ensuring that all areas are covered and that this is documented appropriately in your records, policies and procedures.

Our retained service offerings are made up of three core components to help your business.

The main difference between the services are the frequency and level of support resource provided.

- Monthly support
- Quarterly support
- Six-monthly support Activity Frequency

Many firms find that the pressure of having to keep up-to-date with the volume of publications, hot topic areas of focus and rule changes is onerous.

Our retained services are tailored to meet the needs of your Firm. Whichever package you choose, our clients gain a great deal of value having our specialist consultants regularly bringing expert knowledge and insight into their business from all the specialist areas of our business.

Our comprehensive approach usually consists of:

- a) Face-to-Face support – completing or assisting in your routine activities - on a suitable frequency set out above;
- b) horizon scanning;
- c) ongoing telephone and email assistance - available to you every business day.

In each of our support packages, we also provide our clients with weekly regulatory updates via our digest service delivered straight to their inbox each Friday.



## **Ad hoc advice and assistance**

As a regular service to our clients, we can provide additional ad hoc advice via telephone and email to assist you with any related issues and address any queries you might have for us.

In addition, should you require support on larger projects in specific areas; we will agree with you an appropriate action plan beforehand, including an estimate of time and costs involved.

## **Ongoing Retained Support.**

On-site reviews on a monthly, quarterly or six-monthly basis, in line with your requirements.

Fees range will be based upon general information for your sector and business model, however the scope of work and our fees will be agreed with you once you have clarified your requirements.

## **Ad-Hoc Advice and Projects**

This will be provided as a pay as you go service for any support you may require beyond the scope of the Retained Service above. Whether it is related to drafting a new policy, training or simply answering a query you may have at any given time, the scope of work and a fee estimate will be agreed with you beforehand. The cost of our ad-hoc services will be charged on the basis of time spent at our hourly rate.

## ***Our Guarantee***

Before each assignment commences we will agree which of our proposed rates applies and the budgeted number of days for the expected completion of the assignment. We will conduct careful initial detailed budgeting at staff member and activity level. We will also offer a fixed rate for the service.

## **Flexibility**

The clock does not start running as soon as we pick up the phone to a client. If you have a challenge, we want to encourage you to call us as early as possible, since our aim is to resolve issues before they become problems. We will not charge you for general telephone calls, but obviously will charge you if further action is required and, of course, formally agree our fees with you beforehand.



## **Billing Arrangements, including payment terms**

The firm has a 30-day payment terms. Our proposed fees exclude necessary disbursements, like travel, which will be billed at cost, and VAT (if applicable), which is payable at the standard rate prevailing at the time of billing. Billing is usually conducted fortnightly.

## **Relevant Experience**

LS Consultancy has the expertise and experience to meet your needs.

## **EXPERTISE, KNOWLEDGE and RESOURCES.**

Our Team is fastest growing and dynamic. Client gains come not only from financial services businesses that need regulatory focused expertise that even larger firms cannot provide, but also from start-ups, non financial services, referrals.

We don't operate from shiny, swish city premises. We run a lean and reactive mobile team. At the heart of our success is a team with niche expertise knowledge and qualification, gained from working in-depth at the heart of major City financial businesses and key people within the industry.

## **What Makes Us Different**

Our company believe the expertise and experience is crucial to your success. Our proven ability to cut through complexity and deliver standout results has enabled us to build our reputation. We elevate brands, unlock value, empower the brave and make visions real.

## **Understanding Your Business**

The very nature of our work enables us to gain a unique, detailed knowledge and understanding of your business and what makes it prosperous. We truly believe that we have the knowledge and experience to understand exactly what rules and requirements would be applicable to your business.

Because of this, we have the ability to identify risks as well as any areas for potential improvement. The continued development of a strong, long-term relationship will not only allow us to focus on your specific strategic needs, but will also allow us to feedback insights, suggested improvements and intelligence to senior management.



## **Access to High Level Expertise**

We recognise the importance to our clients of easy access to excellent quality, professional advice. As such, the directors and senior consultants on the team will not only lead the assignment and ensure the utmost quality and efficiency, but will also be highly visible to your senior management.

## **Proactive Advice**

We see keeping you informed on advancements as a component of developing the relationship between our two firms. We will keep you up-to-date with new requirements and industry best-practice through regular meetings, our newsletters, email alerts and keeping you informed of any relevant seminars.

We recognise the importance to our clients of easy access to our experts.

## **A Team That Can Meet Your Needs**

The next few years will be tremendously important for your Firm to achieve its commercial objectives.

LS Consultancy can meet your needs both now and in the future. We have significant experience of collaborating with firms and are able to identify the areas where the Firm is likely to need assistance.

Our proactive, **'hands-on' approach** will ensure that you have the support you need throughout the Firm's lifecycle.

## **Certainty of Costs**

We always take an honest and clear approach to fees, to ensure that both clients and ourselves receive value from a relationship. We take pride in this principle and believe this sets us apart from our competitors.



## Why LS Consultancy?

This document demonstrates that we could meet your needs as they arise.

**A strong team:** we have people that you know and can trust, and our team possesses the right skills and credentials to meet your needs. We will build a strong and valuable relationship with your team to ensure that we provide a positive and beneficial service.

**Breadth of service:** we can offer a number of services that you may require, providing a 'one-stop-shop' facilitated by our client liaison to help your company get the best advice and cost-effective support.

### **Everything is in Place for Your Success**

**The right reputation:** tradition and integrity combined with thoughtful innovation means that LS Consultancy will support your high standards and position.

**The right price:** we are sensible in calculating our fees, to ensure that both of our organisations receive value from the relationship.

## LS Consultancy Culture

Our objective is to assist businesses grow successfully and sustainably against the background of an improving economic climate. This is supported by our central philosophy to provide excellent services, across a broad variety of activities, with an over-riding emphasis on personal contact; we do not just want to provide a service, we want to partner with you as a trusted business adviser.

The following values embody the kind of firm we are and what we want to be, and guide us in everything we do:

### **Delivering Excellence and Value**

We are consistent, reliable and dedicated to quality and service excellence, in all we do. We understand what real value is, and how to deliver it. This means being commercially astute, robust in our advice and being a reliable partner and expert adviser.



## **Working and Growing Together**

Whether with clients or colleagues, we build relationships that are genuine and enduring. Our company believes in teamwork, collaboration and respect. It is very important to us that we enjoy collaborating. We listen, challenge and support each other so that we, our firm and our clients all develop, grow and succeed.

## **Doing What's Right**

To us, this means a lot more than simply upholding professional standards. It means being open, honest, straightforward and fair in every interaction, whether inside our firm, with our clients or in the wider community. We are accountable and take responsibility for our actions.

## **Making Things Happen**

We are ambitious, innovative and always seeking to improve. We encourage initiative and new ideas. Our company believe opportunities are there to be created and make room for people to pursue them. We don't sit back and wait- we explore, we adapt, and we progress.

## **Ensuring Customer Satisfaction**

As a firm, we understand the importance of listening to our clients and taking their views on board and therefore take client feedback, both positive and negative, very seriously. We are keen to understand what we do well, where we can improve, and how we can anticipate and meet our clients' changing needs.

The main method of obtaining feedback is an online survey, sent annually to clients. This survey asks a range of questions about the client's experience with LS Consultancy, including quality of services, timeliness and viewpoints on the assigned service team. Feedback received is discussed with the relevant team members, with further discussion of any negative feedback to ensure that improvements are made. Similarly, positive feedback is also shared amongst relevant teams, so that positive behaviours and actions can be repeated and developed further.

Due to our extensive network we also have connections with huge number of specialists at realistic cost.

With us you always have direct contact with the owner, whatever your issue may be.



LS Consultancy



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