

MAP accountant

CASE STUDY

"With RQ, we finally have the tools to unlock that process of understanding our clients' hopes and dreams and their current personal financial and life situations."

PAUL BARNES, MD

MAP.

SUMMARY

MAP has always cared deeply about its clients' goals. But gaps in insight slowed decisions. Now, with Compass, MAP understands clients better, adds value faster, and manages referrals seamlessly.

33

Compass
reports completed

11

Advisers
on RQ

17

Referrals
sent



Deeper
client relationships

1

BACKGROUND

MAP.

MAP Accountants is a leading Manchester-based firm helping creative business owners grow and make better decisions.

The team takes time to understand each client's business and personal goals, creating natural opportunities to connect them with trusted advisers.

But gaps remained in identifying clients' wider needs.

2

CHALLENGE

Knowing clients' wider needs

MAP needed deeper insight into clients' personal and business goals to give more valuable advice and protect its client base.

No process to make referrals

The firm wanted a way to capture client insights, refer to financial advisers easily, and manage compliance all in one place.

3

SOLUTION

RQ

Unlocking invaluable insights

Compass helps MAP collect insights and gain a clearer view of each client's goals - enabling more tailored advice, deeper relationships, and referrals.

Simplifying referrals and compliance

The shared CRM and referral engine in RQ enables MAP to connect clients with financial advisers easily and securely, while ensuring every referral meets compliance requirements.

4

IMPACT

Since adopting RQ, MAP delivers insights faster and builds stronger relationships through more meaningful client conversations.

With the shared CRM and referral engine, the team streamlines referrals while staying fully compliant.

This approach helps clients make better, more informed decisions about their business and personal goals.