



## What did the client need?

As one of the best kept secrets in private banking, Duncan Lawrie sought to subtly but significantly increase its business development activities and bring its world class range of services to the attention of a somewhat broader but still very select audience. Potential clients in this arena are not susceptible to clumsy or inelegant approaches and rather need an intelligent, patient and highly polished series of engagements before even considering placing any of their financial interests in the hands of someone else.

## How did it work?

Undertaking business development activities in this sector and with a brand as valuable as Duncan Lawrie is a sensitive initiative and needs care and thoughtful consideration in order that the institution's values and reputation are maintained and ideally strengthened. A new and highly talented Marketing Director provided the catalyst for the debate internally and she decided to bring in some external, trusted and no-nonsense expertise in order to bolster and intensify her activities.

## Who's the client?

**Duncan Lawrie** is a private bank with offices in Belgravia, Kent, Bristol, the Isle of Man, and Kolkata, India. Duncan Lawrie Private Banking was founded in 1971, and as well as banking, offers a comprehensive range of investment, financial planning, tax and fiduciary services, both in the UK and internationally.

## What did Positive Momentum do?

The Positive Momentum partner initially worked extremely closely with the key influencers across Duncan Lawrie creating a high level of credibility and trust before:

- Directly assisting the Marketing Director in developing a business development plan which won very broad stakeholder buy-in
- Creating a series of innovative mechanics and events for attracting potential new clients
- Specifically introducing key clients and opinion formers and creating a heightened awareness of the Duncan Lawrie brand
- Working closely with the Business Development team in equipping them to maintain sustainable business development activities

## What were the results?

Since engaging with Positive Momentum, the business took on approximately five times as many new banking clients in the first 12 months compared to the previous 12 months.



## What does the client say about Positive Momentum?

*Working with Positive Momentum, we raised our profile, developed new relationships which we still enjoy, as well as taking on more new clients. All in all, it proved a very successful partnership.*

**Jane Parry**  
Director and  
Head of Marketing  
and Business  
Development

