

At GreenKite, we provide customised Consumer Duty solutions designed to enhance your business and drive positive outcomes for your customers.

Our comprehensive support package includes the essential structure, frameworks, policies, and reporting needed to ensure your firm's compliance with Consumer Duty regulations. This isn't just a service—it's a strategic partnership. With GreenKite, you gain access to a team of regulatory experts and market-leading tools and techniques, empowering your business to excel.

Our service is thoughtfully crafted around the four Consumer Duty Outcomes, ensuring your firm meets the high standards set by the FCA's Consumer Principle (Principle 12). We help you navigate the overarching cross-cutting rules and detailed expectations for conduct, ensuring your business aligns with the key elements of consumer relationships and placing the customer at the heart of your operations.

## YOUR CONSUMER DUTY FRAMEWORK

- **Board reporting and assurance:** Ensure that your board reporting and assurance processes fully comply with regulatory obligations
- **Expertise:** Access to in-depth knowledge and market know how
- **Proportionate and Scalable:** Adaptable to the growing needs of businesses
- **Customer Centric:** Provides a framework to suit your customer profile
- **Flexibility and customisation:** Offers customisable options to meet specific business needs
- **Data Validity:** Qualitative and quantitative data assessment review and interpretation

## MODEL REVIEW

Establish a Consumer Duty Framework that not only meets regulatory requirements but also adapts flexibly and dynamically to new products, services, and business models. Gain access to a comprehensive suite of supporting documentation and templates.

### Culture

Embed and evidence the four drivers of culture: Purpose, Leadership, People, and Governance.

### Governance

Enhance the governance framework to include roles and responsibilities, committee terms of reference, escalations, pack creation, and evidence of discussion, challenge, and approval.

### Board reporting

Review and enhance Board Reporting to ensure clear evidence of the firm's achievement of outcomes and identify areas requiring further action.

### Products and services

Ensure product or service design meets the needs, characteristics, and objectives of target market customers, and that the distribution strategy is appropriate.

### Price and value

Complete Fair Value Assessments to clearly identify costs, benefits, and include market comparators.

### Consumer understanding

Develop and implement test plans and controls around communications (pre and post sales).

### Consumer support

Conduct end-to-end customer journey reviews and develop mechanisms to obtain customer feedback.

### Reporting and data

Review and interpret qualitative and quantitative data assessments. Enhance data collection and analysis to generate required MI for customer outcome monitoring. Improve available data and insights to provide appropriate monitoring through key metrics.

### Training and development

Provide bespoke Consumer Duty Training and specific training for SMFs as appropriate for the firm.



# CONSUMER DUTY SOLUTIONS

*Experts in compliance and assurance*



## WHY CHOOSE GREENKITE?

We are of the market, for the market – our multidisciplinary team of insurance experts offer the benefit of their extensive experience in all aspects of delegated authority, compliance and assurance.

Access deep and broad technical expertise, directed by informed strategic advice and delivered with current market best practice in mind. In addition to an extensive library of templates and reports, we can provide a tailored blend of seasoned expertise through an engagement model designed for your specific needs.

Our commitment to truly collaborative consultancy and dedication to excellent client service provides clients with a long term, trusted partner on whom they can rely, to help grow their business and avoid potential pitfalls.

## OUR APPROACH

Accountability matters - we believe in the importance of having a single, senior, dedicated point of contact for every client who is responsible for the overall success of the engagement. Throughout each client relationship, we continually review and reassess resources to ensure we are deploying the appropriate multidisciplinary team that will deliver real value for every client.

Unlike competitors, we do not flood projects with junior technicians, overseen by managers who are often one step removed. We work closely with each client to understand their unique requirements, then strategically apply appropriate technical expertise in the appropriate areas.

This approach delivers actionable, cost-effective solutions to our clients and material improvements to their bottom line.

## WE ARE GREENKITE

GreenKite is an award-winning, B Corp-certified, independent professional services consultancy, operating in the UK insurance market. We deliver practical, sustainable solutions that efficiently support internal change while ensuring future resilience and regulatory compliance.

Our flexible solutions are built around three core pillars and underpinned by our team's extensive market expertise and commitment to meaningful collaboration to ensure the best possible client outcome.



## HOW CAN WE COLLABORATE?

Talk to us about how we can address your challenges.

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