August

Financial Services

Recognition Workbook

Is your financial services organisation awards-worthy? Let's find out.



Contents

In financial services, trust and credibility matter. But how do you know whether your achievements are ready for recognition, and whether you're doing enough to stand out from your competitors?

This practical workbook will help you assess the strength of your achievements, identify gaps in your evidence and discover where independent recognition could strengthen your reputation.

Financial Services Recognition Evidence Checklist 2
Identify the customer, commercial and organisational evidence that could support a compelling financial services award entry.

Financial Services Competitor Proof Audit 3
Discover how your competitors are showcasing their achievements and where your organisation could stand out.

Recognition Assessment 4
Score your current evidence and understand how ready your organisation is to pursue external recognition.

Who is this workbook for?

Designed for fintech founders, financial services leaders, marketing and communications teams, and those responsible for customer experience, innovation, business growth and reputation across banking, insurance, lending, payments and wealth management.

Your achievements could be more award-worthy than you think.

Financial Services Recognition Evidence Checklist

Tick each statement you can confidently support with evidence.

- ☑ **We can clearly explain the customer, business or market challenge we addressed.**
- ☑ **We can demonstrate measurable improvements in customer outcomes, service or experience.**
- ☑ **We have customer comments, testimonials or qualitative feedback.**
- ☑ **We know what we want to become recognised for.**
- ☑ **We know which audience we want that recognition to influence.**



A useful test

If your evidence only proves that you introduced a new product, service or process, keep digging. Strong recognition stories demonstrate what changed, who benefited and the measurable impact your organisation delivered.



Financial Services Competitor Proof Audit

Choose three financial services organisations that customers, stakeholders or employees might realistically compare you with. Review what someone researching your organisation can independently see before making a decision.

Competitor 1: ----------

Competitor 2: ----------

Competitor 3: ----------

For each one, spend 10 minutes reviewing:

- **Awards displayed on their website**
- **Recent award wins**
- **Finalist announcements**
- **Awards being promoted on LinkedIn**
- **Third-party rankings or accreditation**

Then compare their visible proof with your own organisation.

are your competitors genuinely achieving more, or are they simply making their achievements more visible?

Your biggest recognition gap: ----------

Recognition Assessment

Score each statement
0 = no evidence, 1 = some evidence, 2 = strong evidence.

Statement	Score
We can prove a meaningful customer or market problem was solved.	0 / 1 / 2
We have measurable evidence of customer, commercial or operational impact.	0 / 1 / 2
We can demonstrate what makes our service, innovation or approach distinctive.	0 / 1 / 2
Our external recognition reflects the quality and credibility of our organisation.	0 / 1 / 2
Customers and stakeholders can easily find independent proof of our achievements.	0 / 1 / 2
TOTAL: _____ / 10	

0-3	Evidence-building opportunity
4-7	Recognition-ready foundations
8-10	Strong recognition potential - assess award fit now

TALK TO AN AWARDS EXPERT