



Case Study: CDG Financial Services Limited



IntelliFlo will enable me
to grow the business
without the need to worry
about our back office
functionality as they offer
a truly scalable solution

Formed in 1997, CDG Financial Services Limited have a combined adviser experience of 50 years across a broad spectrum of financial areas.

Working with both individuals and at a corporate level we are committed to delivering impartial advice whilst at the same time ensuring transparency. Our approach to giving advice is in the simplest format; understand where you are, understand where you want to be and then formulate in conjunction with you, a road map to get you where you want to be.

Before selecting Intelligent Office as our preferred software system, we used JCS and were becoming increasingly frustrated, following a stream of broken promises around electronic valuations and electronic commission statements.

It was at this point we felt we couldn't rely on the developments JCS promised to deliver and decided to research the market for an alternative.

Our aim was to find a software system that would enable us to automate as many of our business processes as possible and introduce efficiencies into the business to ensure that all employees were spending their time wisely and in the right areas.

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Philip Wort, Director,
says:
“The commissions
module and electronic
valuations alone have
reduced our time
spend significantly.”

Having seen a comprehensive demonstration from the Sales Team at IntelliFlo, we were pleased with the amount of functionality that the system had to offer. One of our main objectives was to enhance the practices of the business and to drastically cut down the amount of time spent on our current processes. Intelligent Office provided a solution to enable us to do this.

Two of the key functional areas were the ability to reconcile commissions automatically and accurately along with the ability to obtain electronic valuations. These two issues alone more than make up for the cost in terms of time spent. Additionally, the system integrates into our advice process and allows fact find information to be updated following client reviews more easily than starting again each time. Having just adopted the systems task functionality my business is now running even more efficiently.

I don't have to be concerned now with when system developments will happen as I can rest assured that IntelliFlo will take care of this for me, making the transition from one regulatory change to another as simple as possible for us, and all of this is at no additional cost to me. I benefit from regular face to face support from our Account Manager who ensures that I am aware of any new developments that would suit our business and further enhance the practice.

Most of our processes are now automated via Intelligent Office and this ensures that we keep on top of business in progress and ongoing servicing of our clients.

IntelliFlo will enable me to grow the business without the need to worry about our back office functionality as they offer a truly scalable solution.

Can we help you? T: 0845 230 3700