

Case Study: Capital Tower



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We have been providing financial advice to individuals and businesses since 1989. During this period, we have employed a number of qualified professional advisers, all operating within the same high company standards of integrity and transparency.

We adopt a 'holistic' approach to financial planning whereby we take all aspects of our clients' finances into account, to ensure that during the advisory process, each individual is treated as such and the entire operation is tailored to suit their individual requirements. In the financial services industry where many supposedly reputable providers and products have turned out to be flawed, we pride ourselves on the quality of our research and on our attention to detail.

Our services cover the full range of our clients' financial needs. Each of our Consultants takes responsibility for all aspects of the client relationship. Our Consultants are committed to the highest level of personal service and they understand the importance of common sense and a 'jargon busting' approach to financial planning.

As an organisation, we felt that in order to maintain delivering a first class service to our clients, we needed to review our current systems and processes in order to stay ahead of the times. Evaluating our CRM was our main focus. Some of the issues we encountered using our previous CRM software, was that it was too complicated to use, expensive in relation to the amount of use we gained from it and a lack of ongoing upgrades meant we felt we were using an outdated system. Due to these issues, we found that servicing our clients became more of an issue than it should have been.

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Graham Clarke, Compliance
Manager, says:

“Intelligent Office has
provided a positive
enhancement to our business
and improved the service
that we offer to our clients”

To move on and progress as a company, we felt a necessity to increase the quality of our client data. We also required an integrated system to manage our existing clients, which we feel is key to running a successful business. We also wanted the option of remote access without the need for any additional software as this would grant us flexibility for our advisers. Since moving to IntelliFlo, their solution Intelligent Office has already brought huge efficiencies to our business in terms of costs and time. Valuations and commissions processing used to be extremely time consuming tasks with our previous system, however, since the adoption of Intelligent Office, the time savings around these two areas alone have been immense.

Due to the web based nature of the system, we no longer need to rely on maintaining servers, we can produce instant and accurate Management Information and the increased functionality that comes as standard within Intelligent Office provides us with confidence as the solution continues to evolve. Moving to IntelliFlo was the most important strategic decision we have made, the support we receive from both the Account Management and Support teams ensures we receive continual updates and guides us with using Intelligent Office to its full capabilities.

We have also reduced our overall IT costs due to the SaaS based nature of the system. For example, our data is hosted on IntelliFlo's servers and is backed up by them, meaning we don't have to. IntelliFlo also roll out upgrades to the system every quarter, meaning we are always using the most up to date version of the system, something that we never received from our previous supplier.

We also have found that the system is a lot more intuitive and simpler to use than our previous system and this has meant we can concentrate on advising and servicing our clients and generally helping the company's employees to be more productive. Furthermore, due to the configurable nature of the system, we have been able to take full control over the security rights of each individual within the business, ensuring optimal data integrity.

Can we help you? T: 0845 230 3700