



Case Study: Essential Money

**essential
money**

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Essential Money work exclusively with dentists and orthodontists throughout the UK with clients from their early 20s right through to retirement and offer a full range of services including financial planning.

We've been working with dentists for many years and would like to think we've earned an excellent professional reputation for the individual service we offer to our clients. We previously had a contact management system ACT and a whole array of Excel spreadsheets. It worked to an extent, but we felt that this method of recording data was no longer suitable for our business and our clients particularly in this day and age.

Although our previous system had a great deal of flexibility, we only really used it for holding client contact details and we didn't have the time or expertise to develop it. We wanted our ideal back office system to automate commission and invoice payments, be able to produce reports for clients and provide a one stop shop for the administration team to organise their client work. We also needed to improve our ability to provide Management Information. This was a key factor for us, the FSA and any future investor or owner of the business.

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Thomas Dickson, Director,
says

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We didn't have the IT experience to develop ACT for it to work efficiently for our IFA business. Our aim was to reduce the time spent installing, developing and troubleshooting as we wanted to ensure we concentrated on what we do best, advising and spending time with our clients. As our advisers work from both home and from the office, we all liked the idea of remote access to our client data, information and reports.

Working with a market leading system was one of the key decisions for our move.

When we started researching systems we decided at the outset that our next system had to be web based as we felt this was the software of the future. As we conduct a lot of protection and mortgage business, having a system that could integrate with our research software, The Exchange and Trigold was crucial. As well as this integration, we also have access to life and investment houses for electronic valuations which has notably reduced the time spent to receive this important information. Add to that the ability to schedule client's valuations and you have a really efficient valuations process. We certainly believe that we have made the right choice with IntelliFlo particularly when we see the amount of software upgrades they have delivered so far.

The system is perfect for working remotely as we have access to all client information which is updated daily without the need for running additional third party tools such as Citrix. Just by checking a clients record, everyone in the team can see exactly what's happening, be it research, a new business case or a client query regardless of location.

Not having to re-key data means we've reduced human error which helps us offer a professional service and also means that we are spending less time generating quotations. Our quotations are obtained from within Intelligent Office and negates the need to leave the platform.

Having a system with an online history of factfinds creates an excellent compliant history for our business. Our fact finds are time and date stamped when completed and our clients can access them via the Personal Finance Portal. What is great about the portal is that we still have full security controls and are able to grant access on an individual basis.

“Intelligent Office is great - our office administration is significantly more robust and professional than before. Take for example, the task management area. We are confident that all tasks are driven and actioned via the system, allowing our advisers to concentrate on advising clients. If a member of staff is off work we can still continue to provide the same level of service to clients without interruption, by accessing other user’s tasks if required. Like any system you have to become conversant with it in order to obtain the benefits from it. As expected, we’ve found that Intelligent Office is easy to use and provides us with the ability to manage everything for our clients in one place. The days of having to hunt down a blue file to find a policy number are over!” Thomas Dickson, Director

“We recognised that if we wanted to offer outstanding service to our clients that we needed to outsource the areas of our business that others could do better. IntelliFlo does it better”

“IntelliFlo has helped us improve our processes and systems to ensure we’re extra efficient and organised and delivering the service our clients expect. It really brings the whole team together in one place, along with all the client data and administration work that needs doing.” Thomas Dickson, Director

Our initial expectations have and continue to be exceeded, especially with the latest updates of Next Intelligent Office (NIO) which has given us lots of confidence for the future.

Can we help you? T: 0845 230 3700