



Case Study: Howard Wright Ltd



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Howard Wright Ltd, Independent Financial Advisers, have been specialising in financial planning for both individual and corporate clients for over 80 years.

We pride ourselves on our reputation, our truly independent status and the level of service that we provide. Our aim at Howard Wright is to build long term relationships helping our clients to achieve their financial expectations and goals.

As we are truly independent we can select and recommend the products and services that we believe are the most suitable. Our main areas of expertise are Investments, Retirement and Pension Planning, IHT Planning, Trusts, Protection and Mortgages with specialist Advisers and Analysts in each sector.

We have seen a significant growth in our business year on year and as this has continued we felt we needed to review our existing technology which is vital for of our operation.

We required a solution that was easy to use and one which could automate our processes. Our previous system, which we had used for nine years, was complicated and slow. We wanted a system that was fast and simple to use, one that embraced the very latest technology. We were used to a CRM system so the decision to research a new solution was not taken lightly.

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Jo Richards, Director, says:
“We have been using
Intelligent Office since 2007
and have seen massive
developments over that
time frame and truly believe
we have partnered with a
forward thinking organisation
with forward thinking
technology.”

Following a thorough and careful assessment of the various back office platforms, we came to the conclusion that in order to stay abreast of the ever changing regulatory demands and make the most of today’s technology a web based solution was the only choice.

IntelliFlo’s proposition, Intelligent Office scored the highest during our due diligence process, meeting all of our objectives. In addition, the service and help we received from the team at IntelliFlo during the transition period and beyond was excellent.

One of our major fears was data migration. How were we going to move many years of data stored within our existing system and how easy would the transition be? These fears were quickly put to rest; data migration could not have been easier.

Intelligent Office is now the driving force behind our business and has made a significant difference. Lengthy processes have now become automated saving us time and money.

By embracing Intelligent Office we can now confidently determine the true value of our business. This has been possible through the extensive suite of management information reports available, driven from the data held within Intelligent Office.

Intelligent Office is a functionally rich solution which in my opinion represents excellent value for money. Intelligent Office has enabled us to improve our service proposition to our clients and stream line our business which has been achieved through time invested, training, support and ongoing service.

Can we help you? T: 0845 230 3700