



## Case Study: Invest Southwest



Invest Southwest is an IFA practice based in the centre of Taunton in Somerset. We advise on different financial areas from mortgages, investments, protection through to retirement options and wills. We aim to offer the best possible advice to our ever growing client bank as we have vast experience within the industry to enable us to achieve this.

We really needed to move to a solution that ideally was web based and one that delivered what we needed.

We had used different types of back office systems in the past and felt that the systems used hadn't met our needs. *"We had used 1st Software and True Potential before and neither of these systems delivered the level of functionality we required"*, said David Penny.

We really needed to move to a solution that ideally was web based and one that delivered what we needed. We wanted a solution that would enable us to work in an end to end way, with a streamlined process. By using a "joined up" process, this would enable us to access the CRM functionality, fact finding, research/advice, commission, task management/task allocation to different staff, risk profiling/asset allocation, through to the excellent client reports. This makes the audit trails clear and easy to maintain. This, coupled with the Client Portal, enables us to offer the levels of service to our clients that we strive for.

By using Intelligent Office we have also negated the need to update each PC/Laptop individually as this is taken care of by IntelliFlo, remotely. The system is upgraded quarterly with no intervention required by us. We know that we are using the latest version of the software.

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Director says:

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The results since using Intelligent Office have seen us running a more effective, streamlined business and we have become more efficient and productive. We are now able to write more business and spend more time with our clients, which we believe is fundamental to offering a quality service. Also, by using the tasks within the system, we are now finding we can offer a neat faultless customer service as we have all tasks diarised, followed up and clearly evidenced.

We have found we now have a very robust audit trail via the configurable workflow and have found keeping up with our compliance a lot easier to maintain.

Interestingly, we have even found this has helped recruiting new advisers as they immediately like the look and feel of the system and Intelligent Office is largely respected and has a trusted brand.

To add to the functional benefits of Intelligent Office, there are also the continual benefits and services offered by IntelliFlo. Since the implementation, we have been allocated an Account Manager who is supportive, intelligent, charming and had working. She alone is a good enough reason to have migrated our systems and gone through months of the intense pain associated with doing so.

*“We research the market exhaustively and had previously fully implemented 2 of the major competitors’ products over the last 13 years, neither of which ultimately met our needs. Intelligent Office is streets ahead: comprehensive, user friendly, robust and logical. A pleasure to use”* - David Penny, Managing Director

**Can we help you? T: 0845 230 3700**