



Case Study: Jacksons Financial Services

The logo for Jacksons is written in a blue, elegant cursive script.

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Jacksons Financial has built up an established reputation in Cornwall over the last 35 years providing a personal level of service to our clients. Our practice is built primarily around offering pensions advice to companies and principals of companies, and we are now seeing a move towards a more holistic financial planning approach.

Our aim was to find a system that included cohesive CRM, Compliance, Accurate Client Reporting and the ever important fee/commission reconciliation. This functionality was key in our decision making process as this would make our business processes run more efficiently and save us fundamental time in the future.

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Peter Matthew commented, *"The net-native basis of Intelligent Office has meant that our advisers can access their client data anywhere, without the need for a slow VPN connection. In addition, the system has become the basis for many of our business processes, from flagging up files for compliance checking to tracking and reconciling payment of fees and commissions. So much of these are now automated, that it takes the pain out of common business tasks providing us with the ability to act quickly."*

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Peter Matthew
Managing Director

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For me though, the biggest benefit of the Intelligent Office system is the regularity of updates. Our previous provider would advise that a particular piece of functionality was "coming" and inevitably, this never came to fruition. With IntelliFlo, they continually evolve and improve the Intelligent Office system, providing functionally-rich updates every quarter. I know that this means we will always be at the cutting edge of technology, something which is important to me, and which provides many benefits to the business.”

Challenge

As a growing business, the challenge was that our previous system had been excessively added to over the years, was coincidentally bulky and therefore proving to be an un-user friendly system. Due to its desktop based nature the software ran slowly and we were finding it difficult to manage. Much of the data was in a poor state due to having been originally populated by non-financial services personnel. Our initial aim was to cleanse our data by only extracting the information we needed and starting afresh. We wanted a system that was internet based as we would like to expand and have multiple sites in the future, but in the meantime allowing our advisers to work from home in the short term. We also felt the necessity for a system that would automate compliance file checking and KPI production.

Solution

Having researched the market thoroughly we decided to move to a net native system and to identify and filter which data we wanted to migrate across to a new solution. By migrating to Intelligent Office meant we were confident that our data was cleansed during the Data Migration process and more importantly provided us with correct comprehensive Management Information, not only for our clients but for the growth of our business.

The ability to have complete control and to set our own tolerances for file checking was also paramount. We found with the flexible nature of Intelligent Office we could set the parameters we stipulated to ensure the software didn't interfere with how we work as a company. We didn't want a system that would slow the advisory process down or hinder us in any way.

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Automating our own task lists by client type was also a key feature, this has saved a huge amount of time for the staff enabling them to focus on other areas of the business.

Results

The move to Intelligent Office has provided us a much more cohesive approach to many day-to-day tasks. These tasks would have taken a lot more time and effort if we had continued to use our existing system, utilising the task management within Intelligent Office now helps manage all our daily activities. We now have a system which can be tailored to our business processes.

As the Intelligent Office system is highly configurable and scalable, we now have much more of an 'enterprise' level solution, which is completely streamlined within one platform.

"We have seen huge benefits of using Intelligent Office across all areas of our business and have comfort in knowing we have chosen to invest in a true web based solution from an innovative and evolving company.", said Peter Matthew.

Can we help you? T: 0845 230 3700