

Case Study: Legal and Medical investments Limited

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Legal and Medical investments Limited are a specialist IFA, based in the South of England and Wales, providing financial planning for doctors and dentists. The company has seen gradual growth over the last 10 years, with future plans to grow our advisory force from its current adviser count of 18.

A fundamental factor to ensure our growth continues was not only review our overall business model, but our back office system which is the heart of our operation. Our previous system, Quay Software, had become cumbersome and never evolved to deal with our continual growth.

As our advisers work both remotely and from regional offices, we required a system that would allow them to do both and as a web based solution, Intelligent Office was by far the best choice. The Quay system was used primarily by the support staff, with very little input from the advisers. The advisers had limited access to the system and certainly very little knowledge on its functionality. Therefore, we needed to bring the focus of control back to the advisers, giving them greater access to their client data, aiding greater input and having the ability to interrogate their own client information. From a management perspective, we wanted a higher level of understanding of our business and by utilising the functionality within Intelligent Office we now have this data easily accessible.

After researching the marketplace for financial CRM systems and undergoing an intense due diligence process, we decided to proceed with IntelliFlo. We spent a number of month's trialling the system before rolling it out to the whole company. There were many positive areas of the system that we were attracted to, firstly, the web based nature allowing our advisers to access their clients information remotely. Secondly, the ability to link to a number of other financial systems which has already seen immense savings in time and costs.

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Max Spurgeon, Director, says
'intelligent office has been
a positive force in almost all
aspects of our business'

Thirdly, by having access to information, from quotations to valuations through to the commissions has led to a streamlining of our processes. As with any new system it requires an injection of time for us to gain the most from the solution and as time progresses, I cannot imagine the business without it.

From a business perspective not having to be concerned about security issues, back up procedures and other hardware issues, means that we have more time to spend on the core business. I firmly believe it reduces the costs of having all the hardware that is required for such protocols.

The migration process was not without its issues due to the poor quality of our existing data, but we had a high success import rate. It highlighted to us the lack of quality of our existing data and with Intelligent Office, this is an aspect of our business that we are looking to improve.

Our advisers have varying degrees of IT skills. All have been able to navigate their way around the system. The key areas where advisers have benefited are in respect of the full control of their own information. The reporting system is easy to use and generates excellent client facing material that is easy for them to understand. The suitability letter generating facility makes the whole process much easier. The tasks facility within the system allows a good communication flow between adviser and support staff which is crucial when working remotely.

The system has over 90 management reports allowing you to interrogate almost all aspects of your business. These reports allow both advisers and managers to review their business.

In conclusion, IntelliFlo has led to the Company being more efficient and we have been able to make savings in the process and keep more in touch with our business. It is leading us towards the future with a clear, effective manner which will, without doubt, provide our clients with a better experience. Intelligent Office provides us as an organisation, with a market edge over many of our competitors.

Can we help you? T: 0845 230 3700