



## Case Study: Lloyd & Whyte (Financial Services) Ltd



Since our move to Intelligent Office we have transferred from a desktop system to a fully SaaS based solution enabling our advisers to work remotely if required.

Lloyd and Whyte are an Independent Financial Advisory practice with knowledge of, and have access to, the entire market place. So, whether our clients are looking for a full financial review, brief mortgage advice or anything in between, we will deliver a friendly and thorough service that empowers them with all the information required to make an informed decision.

The Financial Services arm of the company is also a specialist provider of independent financial advice to a number of professions. Together with our sister company Lloyd & Whyte Ltd, we work with a range of professional affinity groups delivering a range of services as part of an overall membership package.

As we work closely with the affinity groups, we understand the unique requirements associated with each profession and the intricacies of our clients' financial circumstances.

In addition to providing Independent Financial Advice to individuals, we also specialise in the provision of a number of corporate services for companies.

Our previous software provider was Policy Master and Swift and as our business has developed over the years, we felt our processes also needed to change. One of our key drivers was to be able to produce accurate management information data. We felt uncomfortable

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Daniel James, Director of Business Development, says: "Intelligent Office has provided a positive enhancement to our business, improved our efficiency and our record keeping methods"

that our previous systems were not allowing us to produce this level of data and we then started to think that a change of system was the only way to move forward. After researching various other systems, we decided to use Intelligent Office. Amongst other items, other key drivers included the need for full remote access, move to a paperless system and furthermore to have all our client data housed on one platform and dispose of our time-consuming use of spreadsheets.

In order for us to obtain quality MI information, we firmly believe by using the convenient, pre-populated fields within Intelligent Office, we are confident in the output quality of the data. This enables us to produce accurate reports for submission to the FSA and our Board of Directors. Together with a comprehensive reporting system, Intelligent Office also enables us to analyse our client's portfolios either individually or collectively.

Since our move to Intelligent Office we have transferred from a desktop system to a fully SaaS based solution enabling our advisers to work remotely if required. We are confident that our data is now stored on secure servers and IntelliFlo utilise the expertise of Colt Telecoms for this. We are able to store all manner of client documents including Excel, Word and PDF files.

We also find that using Intelligent Office has enabled us to use straight through processing and negates the need for multiple databases and other additional systems. From the initial new business data entry stage, through to commissions and fee processing we have greatly improved our efficiencies within the business.

IntelliFlo also offer service level agreements and provide excellent on-going support services, such as regular face to face meetings with our assigned Account Manager. Our dedicated Account Manager ensures that we obtain the most from the system and we are also notified when new enhancements to the system are added.

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