



Case Study: Tancreds Ltd



Intelligent Office
seemed to be the most
comprehensive solution
and offered the best
prospect of future
proofing the business.

Tancreds Ltd is composed of a team of Independent Financial Advisers and experienced Administration staff based in Peterborough. Our professional advisers specialise in Insurance, Pensions, Mortgages, Life Cover and Investments & Savings. We also have an offshoot company, Will and Probate Services Ltd which also forms part of our group specialising Will Writing, Estate Planning, Inheritance Tax Planning and Probate Help. The service we provide to our clients is always our main concern and our business has been built with this in mind.

To assist us in delivering a first class service to our clients, we firmly believe in embracing technology and exploiting the benefits on offer to enable us to achieve this.

Prior to adopting Intelligent Office, we were operating a disconnected model whereby we were using a combination of a DOS system, Sesame Office and Excel. The main part of the business used a proprietary DOS based system which was both antiquated and unintelligible to any new users coming into the business. Two of the advisers were used to using the Sesame back office and the other systems were based around Excel and Outlook. When we tried to amalgamate the five separate strands of the business, we could not continue with such archaic processes and we needed to invest in one software package that could cope with all streams of the business.

Case Study: Tancreds Ltd



Nick Ash, Director,
says:
“Intelligent Office has
enabled us to prepare
the business model for
the post RDR world”

We selected Intelligent Office after analyzing what was available in the marketplace as it seemed to be the most comprehensive solution and offered the best prospect of future proofing the business.

To enable us to combine these fragmented processes and after researching the market, we felt the functionality within Intelligent Office would aid in the simplification of our processes. From the CRM functionality, fact find, quotations, integrated word processor, valuations to commissions we are now reaping the benefits. We now have one system for all client information and one process for writing business and client servicing throughout the business.

It took us some time to appreciate the full scope of the Intelligent Office system. However, now that we have got to grips with it fully, it is indispensable. Our clients use the portfolio report system which has been a huge plus for us, the management information and commissions system is excellent. It has enabled us to prepare the business model for the post RDR world and is helping us to move the business to the new model as we move through our implementation phase.

We are pleased with the results from opting for Intelligent Office and the support on offer to us to ensure that we get the best out of the system is a big help.

Can we help you? T: 0845 230 3700