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Case Studies: In Focus



A New Breed of IFA & Service Provider

In Focus Asset Management is a regional IFA with 7 advisers and has grown rapidly in the last year. The major reason for the increase in advisers working with the company is due to the services offered to both advisers and their clients.

Prior to embarking on this planned expansion it was essential that they had the right front- and back-office platform that would meet their current and long-term needs. Nick Stewart, Managing Director, said, "*The Intelligent Office platform was essential for adviser and sales administration which is at the heart of our plans and service offering - without this we would be merely just another also ran.*"

Before selecting Intelligent Office, they used 1st Software and it became apparent that the infrastructure, training and maintenance costs would be too high if they were to expand. "We knew that we needed a system that was state of the art, robust, flexible and gave us zero infrastructure and maintenance costs. This allows us to concentrate on our core activity, providing services to IFA's and advice to clients."

Nick went on to say, "*We understood that if we were to offer excellent services to attract and retain advisers, we would need a solution that allowed access from anywhere. When we looked at solutions to this crucial issue all other providers stated that we would need additional third-party hardware and software licences in addition to the main software licence costs. When asked who would maintain the system, yet more cost was added.*"

Why was it important that the centralised front- and back-office solution be accessible from anywhere using just the Internet?

Nick's answer to this was, "*We knew that advisers would not always wish to come to the office to work. Furthermore if we are to continue expanding we need to keep office costs to a minimum and the best way to do this is empower the advisers to work from anywhere.*"

