

mintblue mb consulting

Key Services

Project Management Services & Consultancy

Tailored project management to fit your company

Project Management mentoring and training

Business Processes and Account Management Reviews

Tailored Project Management

Many companies require a Project Manager to help deliver one or more key projects, but not necessarily on a full-time basis. For example, you may require a Project Manager to initially assess and set up the project framework with your team and then monitor actions and progress on a regular basis, e.g. weekly, or manage and run a project on a part-time basis.

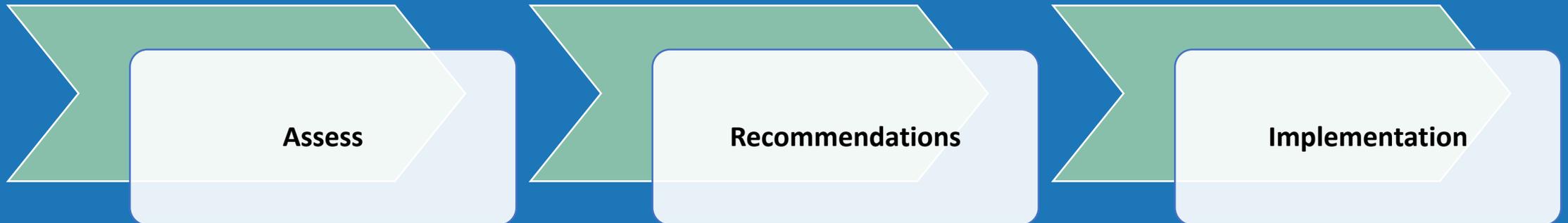
By **tailoring** Project Management services to your requirements, you can **manage Project Management costs** while delivering high quality projects to support and help grow your business.



Consultancy

Businesses often have a number of technology applications and therefore a number of key suppliers. These are not always actively managed due to other business priorities and / or changes of staff.

Reviewing your current technology, business processes, working relationships and contracts can help you better manage your systems while maximising the business and supplier support opportunities.



Training & Mentoring

Project Management is something most people automatically do in daily life and mentoring and training can help develop these soft skills for application in the work place. These can be tailored for individuals or team sessions.

New graduates have benefitted from team training using real life examples from their university years as they prepare for sales roles, while operational staff have gained the skills they need to start delivering projects.

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**'How to run a meeting'
session**

**'How to run a project'
session**

**Individual mentoring and
training**

Case Study: Pre-System Implementation Checks

Companies have valid reasons for wanting or needing to change their CRM systems, however they do not necessarily have the in-house skills or knowledge to understand what is fully involved in the process before proceeding with the actual implementation.

One example recently involved a small adviser firm looking to move from a competitor company to iO and they asked Mint Blue to review the proposed work ahead of signing.

This review prompted a number of queries to the company in question regarding their understanding and knowledge including some of the following:

- The transition between systems
- Resourcing by the business
- Commission record handling
- Training
- Post implementation activities
- Data cleansing

Feedback from the adviser firm was as follows - *'It was good to speak to you too and based on your reply there's a lot more (planning) to this than I imagined. Thanks for this input it certainly highlights what's involved.'*

Mint Blue is able to help firms prepare and understand what is involved before proceeding with a system change. Most changes are through choice and not often time-critical, so it's an opportunity for companies to plan benefitting both the company and Intelliflo.

Case Study: Tailored Project Management

A few years ago, the Mazars Financial Planning team was looking to grow their assets under management without proportionately increasing the size of their back office admin team. As an independent consultant my review highlighted a number of potential projects to streamline their processes including the need for an updated Client Relationship Management (CRM) System to integrate their 'best of breed' system approach.

Following completion of a number of the recommended programme changes, market forces then dictated it was the right time for the business to look for a new CRM System. Given the forward planning, this project was phased over 18 months to best benefit the business.

- The first stage covered the data cleansing and a small initial team was set up within the business consisting of the system administrator and a small group of Graduates (all working on a part-time basis for this project). The clients were segregated, between active and inactive and a 90-field data report created from the existing CRM so any missing data could be identified by exception rather than reviewing every data field for every client which saved a lot of time. This meant the business really understood their client database and what would be migrated across, plus clean data.
- The second stage covered the system selection. This was a full review and involved inviting 18 different companies to complete a detailed survey as part of the bid and tender selection process. Having narrowed the choice there was a presentation round and Intelligent Office was selected as the system of choice.
- The final stage covered the system implementation. This involved the experienced Implementation Manager and team from Intelliflo working with myself as the Project Manager for Mazars Financial Planning to facilitate the system change. My role covered the business project planning, contract reviews, liaison with Intelliflo and training facilitation.

Case Study: Tailored Project Management

The Benefits

Having an experienced Project Manager and Consultant acting for the business helped support the implementation by Intelliflo and meant the project ran very smoothly. It also managed the company's expectations of the amount of work involved by staff, something that is often under-estimated by companies <https://www.intelliflo.com/case-studies/mazars-financial-planning>.

Cleansing the client data as the first step also meant the business had the opportunity to re-segregate and organise the database so they really understood their client bank and what was being transferred ahead of the work starting.

The training involved 90 users and tailoring this on behalf of the business resulted in much higher buy-in and adoption of iO as staff knew what to expect both during and after the implementation.

Working so closely with Intelliflo also developed the future Account Management between the companies while the project was ongoing.

Despite the size of the project, the Project Management was run on a part-time basis thanks to a strong team and the system administrator handling the day to day tasks

Mint Blue Consulting has been subsequently set up with the aim to provide similar project management consultancy to firms.

Case Study: Account Management

Account Management between businesses and suppliers is key, but companies often underestimate the importance of forging and maintaining good links. A new CRM is a sizeable investment for any company, however, understandably, the focus quickly moves back to business as usual once this is in place. Ongoing Account Management can be seen as a lower priority unless the business instigates a plan to keep up to date with new functionality opportunities and continue to build the ongoing relationship.

This was apparent in one smaller adviser firm where staff had been using iO for a while but were experiencing issues with their workflows and needed help to support.

Intelliflo is continually developing its functionality and client support and has the most up to date specialist product knowledge. Mint Blue Consulting helped facilitate between Intelliflo and the company in question to re-engage with their Account Manager and utilise the Intelliflo support, not just for workflow improvements, but also to explore their other services through their Customer Success Team online support, e.g. Valuations and Document Designer.

Mint Blue is looking to similarly assist other companies by assessing their current levels of Account Management and facilitating between them and Intelliflo to help maximise their use of iO utilising the specialist knowledge of the Intelliflo team. This in turn will help maximise opportunities for further system adoption and streamlining of processes.



Helen Clark
[LinkedIn Profile](#)

My passion is taking high level requirements and ideas and breaking them into manageable projects to help businesses grow. With 25+ years experience across IFA firms, supplier delivery and consultancy, I've worked on a wide range of projects and programmes for Financial Planning and Employee Benefit teams to improve efficiencies, profits and business growth.

Key projects include proposition design, CRM changes, DFM Proposition implementation, intranet page designs, acquisitions, compliance and sales team projects, plus involvement at industry level helping to design the Origo messaging for online valuations.

In addition, I spent 5 years working for a top 10 Accountancy firm delivering projects nationally and also across service lines including Operations, Tax, Accounts Outsourcing and Financial Planning. Key projects included a national CCH database merger, offshoring of the HR Shared Services outside of the EEA, the national GDPR project and the replacement of printers for 2,000+ staff.

Supplier Management is increasingly a key part of technology based projects and I've also worked with different suppliers, reviewing contracts, building working relationships and maximising services to benefit both parties.

In the local community, I've undertaken a range of event-organising and more recently instigated and facilitated a local charity to move their accounting from complex spreadsheets to Xero. I currently advise them as part of the Finance Group for proposed projects.

For more information please contact me on:

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