

1-10 ADVISER FIRM CASE STUDY BY 



# Intelliflo eAdviser champions

## Messer & Matthews Limited



### Technology as a source of competitive advantage

Messer & Matthews firmly believes that technology plays a central role in the success of the business by helping to create automation throughout the advice journey. Through the adoption of technology, the one-adviser firm is able to provide an ongoing service to over 400 clients by automating areas of the proposition that were previously manual and resource intensive. Through the elimination of waste in the process, and by focussing on how best to leverage the Intelligent Office practice management system, Messer & Matthews is able to offer its clients a holistic advice proposition for a fee of 0.65% per annum.

Not only is the use of technology creating operational efficiencies for the firm, the benefit of which is passed on to the clients through the pricing tariff, but clients are also able to engage with the technology in meetings with the adviser, where all fact find information is added to Intelligent Office in real-time, improving both client engagement and the quality of the data entered into the system.



### Ongoing technology challenges

The firm has high expectations of the level of automation that can be infused into the advice proposition and this is not surprising given the recent technology developments in the industry. One of the biggest challenges for a smaller business is being able to access and create the most effective technology ecosystem required to serve the needs of its clients. There is strong demand for a practice management system to be able to support and provide access to the right tools and applications, strengthening links in the technology ecosystem. This is an area where firms such as Messer & Matthews could benefit from richer and deeper links with platform and product providers, with two-way data sharing further improving automation in areas such as transactions and reporting.



### The value of benchmarking

Being the inaugural Intelliflo Adviser Champion is something that Messer & Matthews and its principal, Charles Matthews, are very proud of. In our view, the ability to benchmark performance is important to validate how well you are adopting and using technology as an enabler within your firm. Charles views the award as a reward for the great job his team has done in adopting Intelligent Office and infusing technology and automation throughout the firm. This will act as a motivator to make sure the team continues to put automation at the heart of the proposition, creating benefits for the business and clients alike.