

intelliflo

office



Customer story

QSA Financial Services





Business challenges and needs

- **Outdated** software.
- Desire for **better client collaboration** and secure document sharing.
- A lack of **real-time** or quick turnaround support.



intelliflo delivered

- Streamlined **income management** and tracking.
- **Improved** efficiency.
- **Better** client engagement.
- A **smooth data migration** process.
- **Premium** customer service.
- A suite of tools to **support business growth**.

Customer profile

QSA Financial Services is a holistic financial services business and advisory in Bundall, Queensland, which has been servicing clients for 22 years. The broader group developed a name for itself for its menu of services, including lending mortgages, investment strategies, and personal insurances. In recent years, it purchased an accounting firm to offer clients the full spectrum of financial services.

On the wealth side, general manager and adviser Hailey Lawrie and two other advisers manage the financial goals of more than 100 clients per adviser, with the assistance of two support staff. Since adopting intelliflo last year, QSA has achieved champion status, scoring maximum points across key usage pillars. Ms Lawrie explains her experience with intelliflo here:

Drivers for moving to a new system

QSA Financial Services was seeking a software solution with advanced capabilities to meet clients' evolving needs and expectations. While we had been using another advice software system, AdviserLogic, it felt it was becoming dated and did not have the capability to help us to get where we wanted to be. Our profession is changing rapidly and there are also big changes with AI and technology. Noting our client base and our staffing, we needed something that was able to deliver efficiencies, from the process of onboarding right through to advice.

I first heard about intelliflo from another adviser at a product dinner and thought it could be a match for the premium experience QSA Financial

Services wanted to deliver to clients. We set up an initial introductory call to run through of the system's features and what we were looking for. Initially, I was most attracted to the client portal, as I had been looking at adopting something similar for quite some time. We wanted to be able to share insights with our clients and pass documentation to them in a secure manner and the portal offered that capability. Our old software had a version of that, but it was inferior and not visually appealing. intelliflo offered a more attractive interface to engage clients, along with the real-time service support our other provider lacked. It also offered the ability to manage workflows in a way that suited how I like to work.



Everyone at intelliflo was **extremely supportive**. I always have a lot of questions and being able to ask them and **have a response that same day** or to jump on a Zoom call for clarification **made the process easy**.”



Hailey Lawrie, General Manager



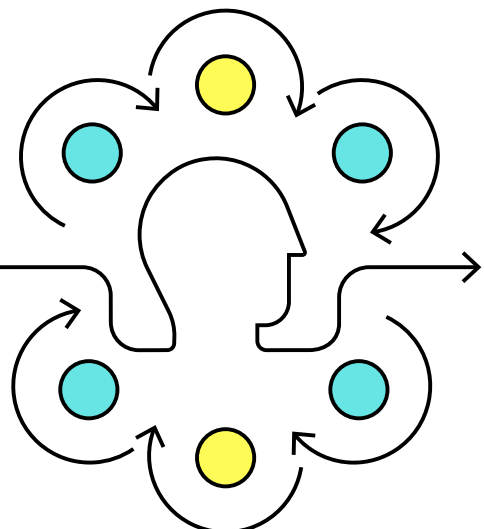
'A fresh start': Our data migration and onboarding experience

The data migration process was easy, with the support of the intelliflo team. I was responsible for managing the data migration and onboarding process internally, with loads of external help from key staff, including Pria, Joyce, Aaron, and Jacob. Prior to kicking off the process, I did a lot of due diligence, which involved using test accounts and ensuring the income side was set up the right way from the start.

Everyone at intelliflo was extremely supportive. I always have a lot of questions and being able to ask them and have a response that same day or to jump on a Zoom call for clarification made the process easy. I had done data migration from two other software providers

previously, but having someone available from the start to help me through it was great. I was prepared for the worst, but I didn't need to be. The efficiencies around troubleshooting are way better with intelliflo than we've experienced with other providers.

The data migration process, itself, gave us a fresh start, in that I was able to leave behind the stuff we didn't need anymore. I loved that too.



Oversight and control across the division

For me, the best part of intelliflo has been the income management capabilities. Previously, I never managed that side at a GM level; it was handled by accounts or the licensee. It meant it was hard for me to track what was happening within our wealth division.

Through intelliflo, I've been able to track reconciliations and conversions and identify a lag in process, which has seen payments

due for extended periods in the past. It's also allowed me to track down providers who were not paying us the right way. I have recently set up short cuts, so it doesn't take me a long time at all to manage. Overall, I now have a better live view of what is flowing from the wealth side of the business, which gives me better oversight of how we're performing and where we are at as a team.

“

I can now knock out 45 provider statements in an hour, which previously **would have taken a lot longer**. Our tracking is now a lot clearer, too.”



Hailey Lawrie, General Manager

Primed for the future

In 2025, our goal is to get all of our clients onto the portals. We've been busy in the past 12 months and haven't been able to focus on getting everyone to use this feature properly, but given it was one of my main reasons for adopting intelliflo, it's important all of our clients can see the benefits.

We also want to insource Record of Advice (ROA) production, which will save us money and allow us to generate those records a lot more quickly. We're excited about what that will bring to the business.

Discover intelliflo office for yourself:

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