

Key Benefits

Visualisation of current processes

Provided a clear picture of activities that support service delivery together with the individuals and systems involved.

Accurate calculation of cost to serve

Confirmation of the time and cost to undertake key processes together with a breakdown by role. The analysis also extended to quantifying the time spent undertaking activities, which add value to clients.

Increased engagement from the administration team

The exercise provided a forum for administration staff to share their views on how to refine processes and maximize the use of key systems. As consequence they have felt more engaged in the business.

Working smarter!

Lifting the bonnet on processes to identify efficiencies

A financial adviser business with a long history in the industry, Baggette & Co understood that working smarter was going to be central to their future success. This would be the foundation to delivering an even better client experience and improving business performance.

So where did they start? At the beginning is the answer and that meant lifting the lid on what they do and how they do it. By modeling and also analysing current business processes they were able to quickly identify areas for improvement.

Jigsaw Tree was able to facilitate this process with a series of workshops supported by enterprise level process mapping software. The system is highly visual and extremely flexible.

The approach was very much collaborative; with members of the administration team fully engaged in the workshops and encouraged to share suggestions for improvements.

key services

-  Process Modeling Workshops
-  Process Model Diagrams
-  Process Model Reports

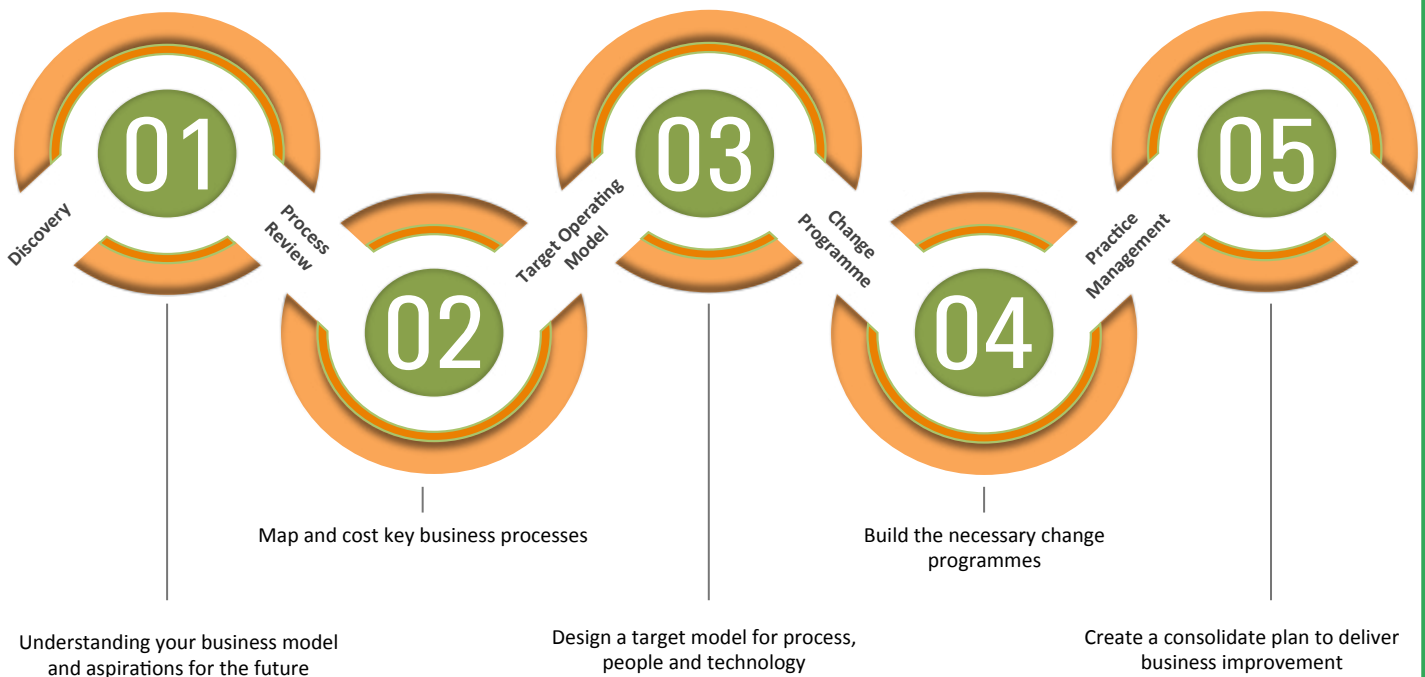
These workshops have been a revelation for our business.

We now understand the cost/effort to deliver key services and are therefore able to focus our resources on the improvements we know will secure efficiencies for the business and add more value to our clients.

The exercise will also form the foundation of the work we are doing to align our processes with the key technologies in the business, thereby maximizing our investment in those solutions."

Vicky Baggette - Managing Director

Jigsaw Tree Client Engagement Lifecycle



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business improvement is a journey not a race