

Achieving operational efficiency through effective use of technology

Key Benefits

Providing additional operational capacity and risk reduction to achieve project outcomes

Delivered technology expertise – through knowledge and expertise in the UK Financial Advice technology market, Jigsaw Tree were able to ensure that deVere United Kingdom were able to progress with their operational changes by delivering against a comprehensive plan and a set of key objectives

Creation of workflows – to ensure all staff in the UK were working consistently throughout all day to day operational activities

Technology Expertise

deVere United Kingdom are part of one of the world's leading independent financial advisory firms. They are an innovative, industry respected provider of in-depth, long term financial management solutions.

Through discussions with their technology provider, deVere United Kingdom realised that there was a clear need to look at operational efficiencies and progress them through the business to ensure business objectives were achieved. The initial requirement was to drive the adoption of Intelligent Office, their chosen technology from Intelliflo, and ensure it was embedded throughout the business.

In order to meet this initial objective deVere United Kingdom knew that

they needed to map out business workflows and have the systems in place to back these up; ensure consistency of data entry; creation of document templates through document designer; implementation of iO's Personal Finance Portal; ensure any integrations were being used to drive efficiency through the organisation. Whilst they are a leading financial advisory firm they recognised they weren't proficient in this technology and needed some external support to embed this in their business.

Jigsaw Tree were engaged to be the interim Head of Systems to support the acceleration of the technology projects and recruit a permanent Head of Systems.

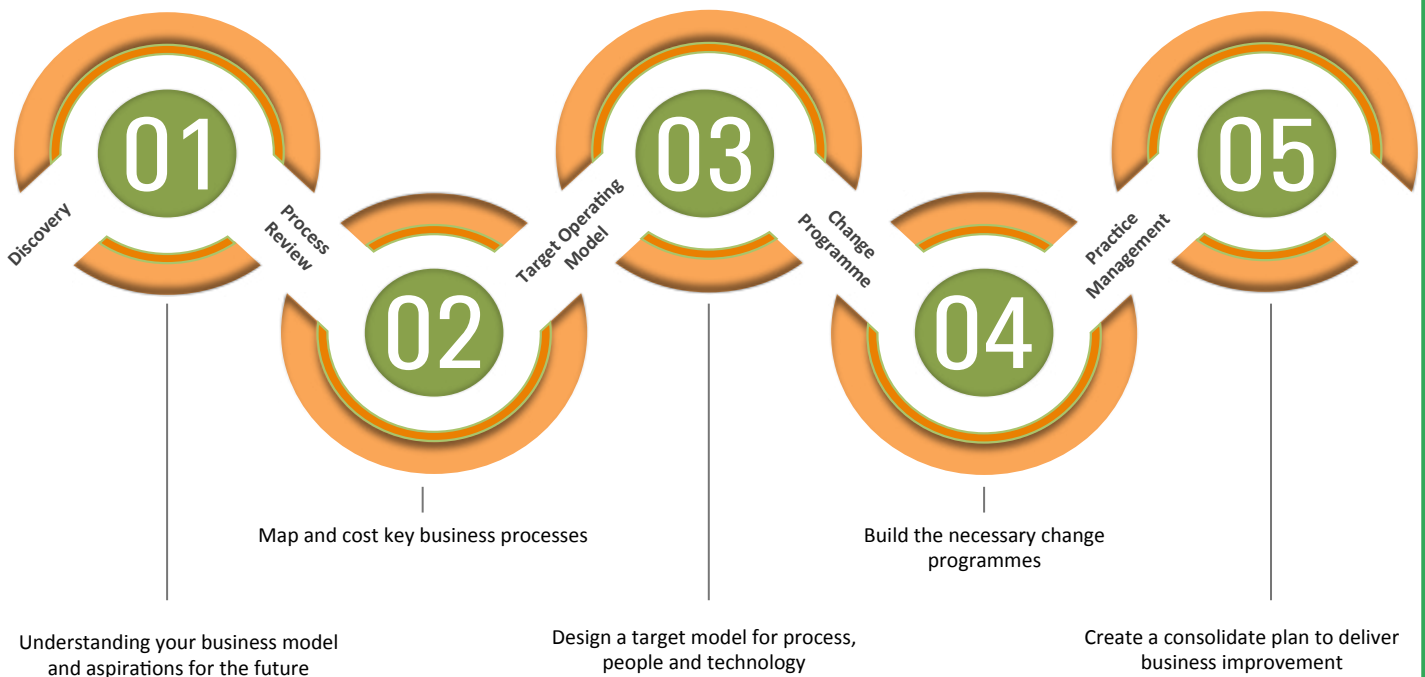
key services

- Interim Head of Systems
- Production of standard business workflows
- Drive through the adoption of Intelligent Office
- Project Management
- Creation of an iO Super User Team
- Introduction of the iO Learning Management System

Whilst we knew that we needed to look at how we were using technology within the business, we realised that we didn't have the knowledge internally to be able to fulfil this piece of work. By bringing Jigsaw Tree into the business we have been able to see straight away how their detailed knowledge of FS technology and their use of process modeling technology has had a huge, positive impact on the business. By driving the use of technology through the business, we are reaping the reward of operational efficiencies in all departments.

Mike Coady, Managing Director

Jigsaw Tree Client Engagement Lifecycle



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business improvement is a journey not a race