

Delivering Business Improvement

Consistent client experience

By delivering standard business processes and associated documentation we have ensured that all clients get a consistent service, whatever their relationship with the firm. As an added benefit we have also been able to reduce manual effort and therefore the risk of error.

Accurate financial records

Delivering quality management information has enabled FiveWays to streamline regulatory reporting and plan ahead with reliable forecasting of future income.

More time for client work

Our support gave the management team more capacity to work on what they did best: developing client relationships and enhancing their proposition. This was critical to moving the business forward and giving them the work balance they were looking for.

Supporting the transition to direct authorisation

The success of a business is closely linked to its ability to deliver strategic change. The challenge in the Financial Adviser market, is that many business owners are themselves practitioners so they have limited time to manage change projects.

FiveWays recognised this early when they decided to leave a network and become directly authorised. They understood that with increased responsibility came the need to strengthen their operation in a number of areas.

A case in point was to increase the use of technology to enable the creation of more efficient processes. This would strengthen their control of operations and as a result ensure that they were best placed to manage risk.

Furthermore the management team wanted to ensure that their income was correctly managed so they could monitor financial performance. This empowered them to create effective business plans based on reliable management information.

Jigsaw Tree were not only able to design the business improvements that were necessary to address these needs, but importantly we were also able to manage the implementation of the various activities. This was achieved using a well structured and collaborative approach to project management.

Having successfully assisted FiveWays in this transition, Jigsaw Tree have been retained to provide ongoing Practice Management support, which facilitates continuous business improvement.

key services

- 🧩 Data Cleansing
- 🧩 Business Process Redesign
- 🧩 New Process Implementation
- 🧩 Management Reporting Programme
- 🧩 Project Management
- 🧩 Outsource Income Reconciliation
- 🧩 Practice Management Support

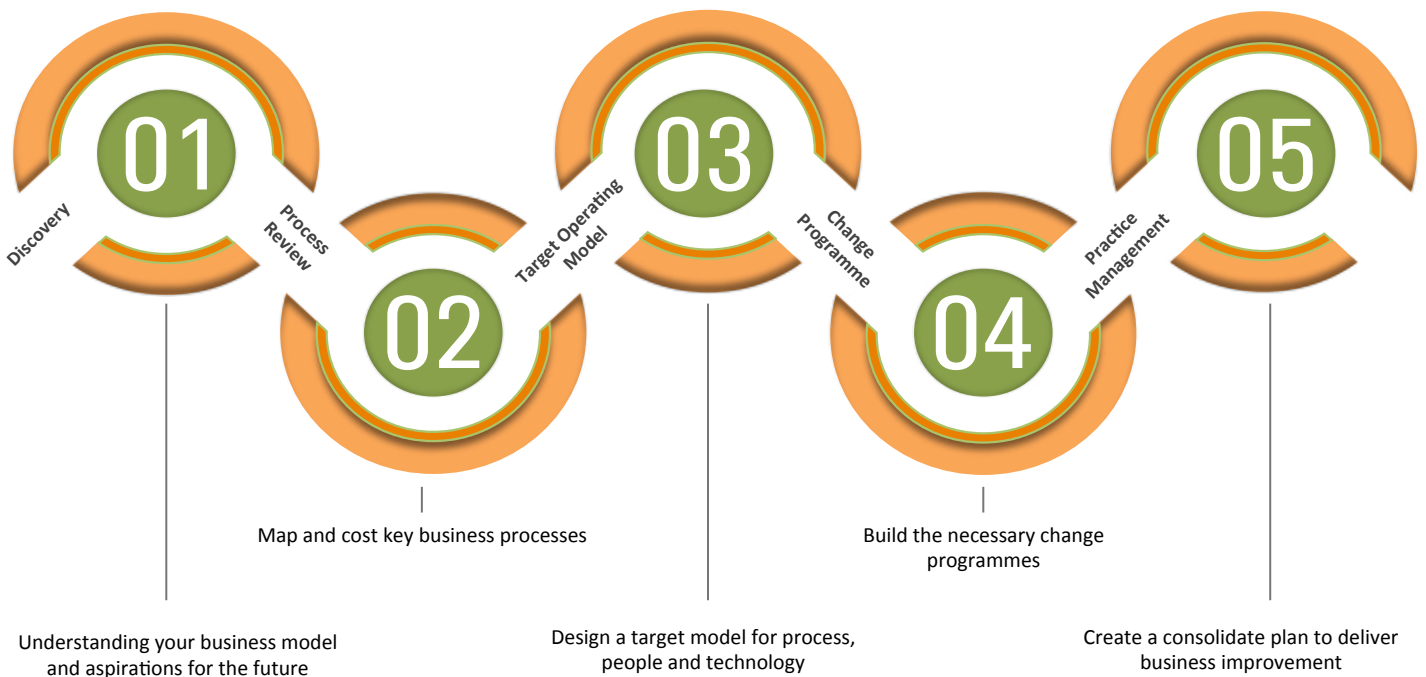
We would not be where we are now as a business without Jigsaw Tree.

They helped create a suite of standard processes and their advice has had a really positive impact on how we use technology in our business.

We signed up for their outsourced Income Reconciliation service to provide us with the robust controls, over revenue recording and reporting we needed as a directly authorised business.

Jon Lawson Director

Jigsaw Tree Client Engagement Lifecycle



Please contact us so we can discuss your requirements:

@ info@jigsawtree.com

☎ 0845 643 2144

🐦 @jigsawtree.com

www.jigsawtree.com

business improvement is a journey not a race