

## Transforming Efficiency and Client Service



## How Expert Configuration and Training Transformed the Use of Intelliflo Office



### Key Benefits

- Increased operational capacity
- Enhanced iO configuration
- Strengthened administrative and income management processes
- Improved quality of income management reporting

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“We have become confident users of Intelliflo Office, fully utilising its extensive features that we were previously unaware of and unable to implement. The team guided us through every step of the process, configuring our site, ensuring professional management of our outsourced tasks and eliminating our worries. The entire experience has been transformative, and I highly recommend their services to anyone in a similar situation.”

– **Andrew Stocker**  
Director

## Key Services

- Project Management
- Acer Configuration
- PFP Implementation
- Outsourced Income Reconciliation
- Outsourced Administration

Despite having Intelliflo Office (iO), AMS Wealth Management Limited was not fully utilising its features, impacting team efficiency and client experience. Andrew Stocker engaged Jigsaw Tree to optimise the configuration of iO for better utilisation.

After thorough discussions, Jigsaw Tree configured their Acer package into iO, tailored specifically for small financial advisory firms. This package includes best practice workflows and document designer templates, among other features. Following comprehensive training, both on-site and remote, Jigsaw Tree successfully operationalised the AMS Wealth team, enabling them to fully leverage iO's rich functionality.

Throughout the project, Jigsaw Tree provided exceptional project management, regularly updating the AMS Wealth team on the project scope, delivery timelines, and progress. This consistent communication ensured that everyone was aligned and informed at each stage of the implementation.

The transformation at AMS Wealth Management has been remarkable. The firm now has:

- **Clear visibility of their pipeline**
- **Oversight of annual reviews**
- **Enhanced operational processes**

Andrew was so impressed with the results that he decided to outsource both administration and income reconciliation to Jigsaw Tree. This decision led to:

- **Increased operational capacity**
- **Strengthened administrative and income management processes**
- **Improved quality of income management reporting**
- **Enhanced annual review processes and valuations amongst other things**
- **Helping to cement Consumer Duty responsibilities throughout the company**

These improvements have allowed the team to focus more on client-facing activities, confident that the outsourced tasks are being effectively managed.

More recently, Jigsaw Tree was invited back to implement the PFP client portal. This project was also highly successful, underscoring the team's expertise and the seamless integration of new functionalities.

AMS Wealth Management Limited has significantly improved its operational efficiency and client service capabilities thanks to Jigsaw Tree's expert project management, configuration and training. This partnership has not only optimised the use of iO but also introduced valuable outsourcing solutions that have streamlined our processes and allowed more time for client engagement.



Please contact us so we can discuss your requirements:

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