



## Intelliflo On-Site Training



## Advice Journey and Document Designer and beyond



[www.albertgoodman.co.uk](http://www.albertgoodman.co.uk)

### Key Benefits

The trainer's flexibility allowed Albert Goodman to cover a variety of diverse topics in the sessions.

The comprehensive training delivered will allow the delegates to develop a new consistent way of working

Having received configuration training Albert Goodman now have the internal expertise to align Intelliflo Office more efficiently



By working with Jigsaw Tree they have delivered significant value to enable us to improve adoption of Intelliflo Office. Our users were impressed with the trainer's flexibility and knowledge of all aspects of Intelliflo Office."

– **Stephanie Martin**  
Office Manager

## Key Services

- On-site end-user training
- Configuration training
- Remote support for queries

Stephanie Martin from Albert Goodman contacted Jigsaw Tree in December 2022 having been recommend by another client, to discuss how training support could be provided to their staff.

The requirements of the training were discussed in some detail to ensure this was tailored to the needs of the firm and its staff and the specific competency-based learning objective agreed.

The business wanted to ensure that their staff were trained to an agreed level and had a requirement for this training to be delivered on-site as opposed to a remote alternative.

All the training was conducted on-site in the Albert Goodman Taunton office and the training days were broken down into the following:

- 1 day of superuser training focused on Document Designer and workflows
- 1 day of mortgage workflow configuration and super user queries
- 2 days of administration training covering how to use the new Advice Journey functionality.
- 1 day of adviser training giving an overview of the entire system and then a focused session for the advisers on the new Advice functionality and PFP (portal)

The feedback on the training was positive and the trainer was able to ensure all the required elements were delivered. It was commented on how well the training was accepted by all delegates, as well as the trainer's flexibility in his delivery and knowledge of Intelliflo Office.



Please contact us so we can discuss your requirements:

@ hello@jigsawtree.com

0800 246 5416

@jigsawtree.com

www.jigsawtree.com

