



Practice Management change and implementation



Moving from Fairs, selecting and implementing Intelliflo Office



ALAN STEEL
ASSET MANAGEMENT

www.alansteel.com

Key Benefits

A fully tested 'Request for Proposal' process

Each stage of the process was measured and documented

Project Management and configuration support in the onboarding process

Training and floor walking to give the end users confidence in use



Jigsaw Tree provided us with a positive experience throughout the two programs of work. It was clear through our engagement with them that they had been through this process many times before and that gave us high levels of confidence. Their thorough understanding of our needs, documented strategy, and hands-on support ensured a seamless process. Their expertise was evident from the selection phase through onboarding and beyond. They lived up to expectations by delivering a solution that will provide ongoing benefits to Alan Steel Asset Management for years to come.”

– **Carol McNicol**
Financial Consultant

Key Services

- RFP
- Implementation/Configuration
- Project Management
- Training and floor walking
- Post live drop-in sessions

Alan Steel had been using Fairs for a significant number of years and had been evaluating available technology options, they recognised the need for guidance in the selection process.

Jigsaw Tree provided invaluable support by collaborating with the Alan Steel team to comprehensively understand their requirements and ensure these were fully documented, along with a strategy document. Once these documents were in place we talked about the providers in the market and drew up a shortlist. The RFP process was measured and documented at every stage to support the decision making and finally Intelliflo was selected as the right technology partner for them.

Once Alan Steel was ready to onboard with Intelliflo, they got in contact again to see how Jigsaw Tree could support their onboarding program. We allocated a project and training manager to support their configuration and training needs. He worked alongside the team and spent two weeks in Scotland providing training and floor walking support. Post live we have delivered some drop-in sessions to ensure the end users are confident in using the solution.



Please contact us so we can discuss your requirements:

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