



Implementation of a change in Technology



The transition from Adviser Office to Intelliflo Office



<https://www.eas-ifa.com/>

Key Benefits

Project Management – Jigsaw Tree was able to support EAS in the navigation of the implementation project and make sure it remained on track, aligned to go live date.

Configuration – delivering good practice through the configuration meant that iO could be used from go live with no delays.

Training and drop-in sessions – users had access to someone with a wealth of experience who understood the challenge of moving technology and the practical knowledge of using iO in an IFA Practice.



By working with Jigsaw Tree we were able to leverage their expertise and knowledge, they worked really well in collaboration with our chosen technology provider which meant we achieved a better outcome than if we had tried to do the transition on our own”.

– **Hannah Prentice**
Office Manager

Key Services

- Project Management
- Configuration
- Training
- Floor Walking
- Drop in Sessions

Executive Advisory Services (EAS) have been providing financial advice to individual clients since 1992 with a skilled team of advisers and support staff and had been using Adviser Office (AO) for many years.

However, with the impending switch-off scheduled for AO EAS had decided that they would migrate over to a new CRM solution and selected Intelliflo Office (iO). As EAS had been using AO for a significant number of years it was felt that having support in this transition would help to ensure that good practices could be implemented from the outset.

Following an initial meeting with the EAS senior team, Jigsaw Tree was selected to provide project management and technology transition support. The reason for this selection is that Jigsaw Tree has significant experience in helping firms to transition technology and have expertise in both the current and new technology. This gave EAS confidence that we would be well supported in this significant change.

This meant that Jigsaw Tree formed part of the core project team and worked with EAS and Intelliflo to bring about the best possible outcomes. Jigsaw Tree attended each of the workshops in order to maximise involvement and provide the best level of support so that the configuration of iO would deliver benefits immediately after going live.

Jigsaw Tree also delivered training, floorwalking, and drop-in sessions which provided confidence to the end users that they understood the technology and knew how to navigate their way around.



Please contact us so we can discuss your requirements:

@ hello@jigsawtree.com

☎ 0800 246 5416

🐦 @jigsawtree.com

🌐 www.jigsawtree.com

