



# case study

## Driving Operational Efficiency with Plannr Configuration - From Process Mapping to Automation: A Roadmap to Scalable Success



When Conor O'Sullivan, founder of O'Sullivan Financial Planning Ltd, first adopted Plannr, he took a hands-on approach to configuration, managing the platform himself. As an early adopter and strong believer in technology-led efficiency, Conor knew the system inside out. But over time, his business began to grow - evolving from a one-man operation into a thriving team.

With expansion came complexity. Conor recognised the need to streamline internal operations and drive greater efficiency across his growing team. He reached out to Jigsaw Tree already known to him as a "Friend of Plannr" for expert support. The collaboration began with Process Mapping, using the Engage Process tool to visualise, document, and assess key workflows in the business.

The first phase was kicked off with a team-building day in Birmingham, where the entire team came together to define what would become "The OFP Way" of working. The result was a detailed and collaborative blueprint of business processes that would serve as the foundation for enhanced workflow automation within Plannr.

When O'Sullivan Financial Planning Ltd partnered with Jigsaw Tree, the goal was clear: to translate their growing firm's needs into scalable, streamlined processes that could be embedded into Plannr. The collaboration delivered tangible, long-lasting improvements across the business. Here are three of the most impactful benefits the firm experienced:

### Key Services

- Process Mapping
- Plannr Workflow Configuration
- Training

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### Collaborative Process Design for Greater Team Alignment

One of the first steps was mapping out key business processes using Engage Process, a powerful tool for visualising and documenting workflows. This wasn't a top-down exercise - the entire team was involved from the beginning. The process design session in Birmingham acted not only as a technical workshop but also as a team-building event, encouraging staff to define what "The OFP Way" really meant in practice.

By visually mapping out how each part of the business operates from client onboarding to annual reviews - the team achieved a shared understanding of their roles and responsibilities. This collective input helped identify bottlenecks, eliminate duplicated effort, and ensure that new workflows would reflect how the business should operate as it scales.

### Scalable Workflow Configuration Within Plannr

Once the processes were fully documented and reviewed, Jigsaw Tree configured them directly into Plannr leveraging the platform's powerful automation and workflow capabilities. Key workflows included:

- Prospect Engagement
- Client Review
- New Business Submission

This configuration work meant that day-to-day tasks no longer relied on memory or manual checklists, and removed the risk of different adviser teams doing things their own way. Instead, staff could follow clearly defined steps with automated reminders and handoffs built in. The result was greater consistency, reduced risk of errors, and a workflow engine that adapts as the business grows.

### Bespoke Remote Training for Confident Adoption

With new workflows in place, the focus shifted to training. Jigsaw Tree delivered tailored remote sessions to ensure each team member understood how to use Plannr's updated functionality in a way that matched their role and responsibilities.

These sessions weren't generic. Instead, they were carefully planned with training agendas agreed in advance, offering real-time feedback, Q&A opportunities, and practical demonstrations. This approach ensured a high adoption rate and helped the team transition confidently.

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““As our team grew, I realised that what worked when it was just me no longer scaled. I needed to remove me from the process. Jigsaw Tree helped us capture the way we work and turn it into a system that works for the whole team.”

“We’ve moved from everyone doing things their own way to having one unified system. The clarity and time savings have been huge.”

“The session in Birmingham wasn’t just about processes; it was about clarity, culture, and team collaboration. It set the tone for how we’ll operate going forward.”

**Conor O’Sullivan - Chartered Financial Planner**

**Greater Team  
Alignment**

**Scalable  
Configuration within  
Plannr**

**Confident  
Adoption of  
Workflows**

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