case study

HYMANS ❖ ROBERTSON

Transforming intelliflo office (io) : Process Optimisation Through - Process Mapping, System Configuration, Training & Outsourced Reconciliation

Hymans Robertson had invested in io, but the system wasn't being fully utilised. This resulted in inefficiencies and missed opportunities to streamline workflows and improve business processes. To unlock io's full potential, they partnered with Jigsaw Tree to optimise the system around a more unified operational approach.

The Solution

Jigsaw Tree led targeted workshops to map Hymans Robertson's end-to-end business processes. These sessions clarified workflows, created consistency, and formed the basis for tailoring io to the firm's specific requirements. Key areas of focus included:

- Process Mapping: Creating clear, standardised workflows across the business
- System Optimisation: Configuring key io features like workflows and document templates
- Management Information (MI): Aligning processes and system setup to deliver actionable MI and track KPIs
- Training & Adoption: Enabling staff to confidently use io and maximise its functionality

Following successful implementation they decided to expand their partnership with Jigsaw Tree by outsourcing their income reconciliation.

The Results

Following the project, Hymans Robertson now benefits from:

- Clear visibility of business pipelines and key processes
- Improved oversight of annual reviews, supporting regulatory compliance
- More efficient operations, with processes tailored to their needs
- Enhanced MI for effective performance tracking
- Increased operational capacity

The project was delivered in close partnership with Wendy Brunton and her team, with Jigsaw Tree offering expert insight and practical solutions throughout. Their deep knowledge of io and ability to align it with Hymans Robertson's goals made a measurable impact.

Key Services

- Process Mapping
- Project Management
- io Configuration
- Training
- Outsourced Income Reconciliation

Contact us!

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"Working with Jigsaw Tree has been a game-changer for Hymans Robertson. Their expertise in process mapping and io configuration has helped us create a more efficient, structured, and streamlined way of working. We now have clear oversight of our key business processes, ensuring we stay on top of regulatory requirements while improving operational efficiency. We now have full confidence in the accuracy of our data, ensuring complete transparency and control.

Thanks to Jigsaw Tree, our review process is now fully embedded, meaning no reviews are missed, and all client touchpoints are tracked and managed effectively. The workflows and system configuration they implemented ensure that every client journey is supported consistently, with repeatable processes in place to accommodate all eventualities.

The team's project management and ongoing support have been invaluable, and we consider Jigsaw Tree our go-to partner for all things io. We highly recommend them to any firm looking to optimise their business processes, use of io and enhance operational resilience."

Wendy Brunton - Business Manager

www.hymanspersonalwealth.co.uk

| **Increased Operational Capacity** | **Reduced Risk due to business processes and policies embedded in workflows** | **Improved visibility and oversight** |

Contact us!

hello@jigsawtree.com
www.jigsawtree.com
@jigsawtree