

case study



Keeley & Co

Navigating the PMS Selection Journey: Driving Efficiency with the Right PMS

Keeley & co, a long-established independent financial advice firm, was undertaking a strategic review of its technology as part of its broader succession and operational resilience planning. Its long-serving Practice Management System (PMS), JCS, had supported the firm reliably for over two decades but was no longer fit for purpose in a modern, highly regulated, and increasingly digital client environment.

The leadership team recognised the need for a new PMS that would drive efficiencies, improve client engagement, streamline workflows, enhance regulatory compliance, and enable future growth. To support this crucial selection process, Keeley & Co partnered with Jigsaw Tree to run a structured Request for Proposal (RFP) and tender exercise.

Keeley & Co's priorities in replacing its PMS were clear:

1. **Efficiency & Automation** – Improved workflow management, data capture, and integrated reporting.
2. **Client Engagement** – A modern client portal to enhance transparency and communication.
3. **Compliance & Resilience** – Stronger regulatory tools, audit capabilities, and system resilience.
4. **Integration** – Seamless connection with other key systems used across the firm.

With limited internal capacity and the need for a rigorous and impartial process, Keeley & Co sought Jigsaw Tree's expertise to ensure the right suppliers were identified, assessed, and ultimately selected.

Key Services

- RFP Service
- Tech Selection

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Jigsaw Tree acted as an independent advisor, guiding Keeley & Co through every stage of the selection journey:

1. **Discovery & Requirements Gathering** – Starting with in-depth workshops, Jigsaw Tree worked with stakeholders to capture core business requirements and establish success criteria.
2. **Tender Process Management** – From preparing and issuing the RFP to scoring supplier responses against Keeley & Co's needs, Jigsaw Tree structured a transparent, objective selection process.
3. **Supplier Evaluation & Demonstrations** – Jigsaw Tree facilitated structured demos, coordinated reference site checks, and provided comparative analysis to enable informed decision-making.
4. **Negotiation & Implementation Planning** – Once a preferred supplier was identified, Jigsaw Tree supported Keeley & Co through final negotiations and agreeing on an implementation approach.

Throughout the process, Jigsaw Tree provided structure, expertise, and momentum ensuring the project stayed on track despite Keeley & Co's busy day-to-day commitments.

"Jigsaw Tree gave us the structure, independence, and expertise we needed to make the right choice for the future of our firm. Their ability to manage the process, ask the right questions, and keep us focused was invaluable. We now have complete confidence that the PMS we've chosen will support our people and clients for many years to come."

Luella Keeley - Director & Chartered Financial Planner

Confidence in Decision-Making

Time Saved for Leadership

Future-Ready Technology Platform

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