



jigsawtree

business improvement is a journey not a race



Document Designer Report – What a game changer!



## Automating report outputs



[www.mazars.co.uk](http://www.mazars.co.uk)

### Key Benefits

Improved efficiency and productivity

Automating report production using existing data to pre-fill report sections

Better control and consistency in client facing materials



We are delighted to have been able to provide Mazars Financial Planning with this piece of work which has added value into their advice process, both from a firm and client perspective. Its roll out was so successful that they have agreed for Jigsaw Tree to provide them with some further work.

– **Chris Baigent-Reed – Founder & Director, Jigsaw Tree**

We'd had a go at creating a pre-populating template for our new style advice report but had got a bit stuck with formatting issues and getting it all to work smoothly. Jigsaw Tree were invaluable in going beyond our initial remit to thoroughly understand what we were trying to achieve and then producing a fully functional template which really optimised efficiencies in producing the report. Their knowledge and skill in Document Designer in particular was pivotal in getting this important project over the line and rolled out across our business. We have already engaged Jigsaw Tree to support us on more Document Designer and other work.

– **Shirley Reeve – Operations Director, Mazars**

## Key Services

- Document Designer expertise
- IO knowledge and experience
- Interlinking background in advice and paraplanning process to ensure seamless and compliant document production.

### Mazars Financial Planning has previous experience of Jigsaw Tree and had a requirement to be able to automate some reporting requirements.

Their needs were complex, but by working with Jigsaw Tree who were able to understand how to achieve the best outcome by producing, testing, and training on the report and data entry requirements, Mazars gained a positive outcome.

The purpose of this work was to produce an automated suitability report template, feeding information from the Intelligent Office CRM solution directly into Microsoft Word. This data is used within the Document Designer tool to build a user and client friendly output utilising as much automation as possible to reduce production time - improving accuracy and efficiency.

The task was multi-faceted, and Jigsaw Tree provided expertise in Document Designer, Microsoft Office and the advice and paraplanning process in order to support the business through this transition and produce better than the desired outcome. The roll out of this report has been very successful with full adoption across the business saving huge amounts of time in the advice process and increasing productivity overall.



Please contact us so we can discuss your requirements:

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