Technology Transition

Changing CRM Solution – No pain no gain

HSP

Financial Planning

www.hsp-ifa.co.uk

Key Benefits

Confidence & Support
Jigsaw Tree were able to give confidence and support to the team throughout the technology transition process

Expertise
Having expert help on hand through the process ensured any issues were sorted quickly and gave staff more confidence in their new technology from day one

Best Practice Processes
By defining best practice processes at the beginning of the transition ensured HSP aligned the workflow functionality to their agreed working practices

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Jigsaw Tree's involvement in our move to Intelligent Office was instrumental in us achieving a better transition with the right level of support. As a result, our staff, from Directors to Administration, have more confidence from go live.

Jigsaw Tree's in-depth knowledge of both our incumbent system and Intelligent Office was invaluable when it came to looking at our data and what we needed to do to have clean data in the new technology.

– Tracey Stanhope
Office Manager

Key Services

- Commercial Negotiation
- Project Management Support
- Data Cleansing
- Process Modelling
- Floor Walking
- Income Transition

HSP Financial Planning, based in Whetstone, Leicestershire was established in 1977 and have built a reputation for providing trusted professional advice with approachable and dedicated staff.

After using Adviser Office for nearly 30 years the management team made the decision to move to Intelligent Office from Intelliflo. Intelliflo provided help with the implementation through an Onboarding Consultant, however, HSP realised that they needed external resource to support them in this change to ensure a better outcome with this transition, with less disruption to day to day work.

Jigsaw Tree were recommended to them and after initial discussions an agreement was reached on the support needed.

With Jigsaw Tree's in-depth knowledge of Financial Services technology there were several areas where support was provided:

- **Commercial negotiation**
- **Project management**
- **Process mapping**
- **Data cleansing**
- **Service case and Workflow creation**
- **Floor walking for go live**
- **Income management transition**

Please contact us so we can discuss your requirements:

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