



# Digital Transformation – how can this be applied to your business?

## What is digital transformation and why does your business need it?

There's a reason that everything is done online these days and that reason boils down to digital technology simply being more efficient.

For many businesses, digital transformation refers to the implementation of digital technology to transform the products and services they provide or the way in which they are provided. Usually achieved by replacing manual processes with digital systems and automation, digital transformation allows businesses to effectively streamline their services and present clients with more easily accessible information.

Where client satisfaction should always be at the forefront of your business' goals, digital transformation will allow you to track your clients' progress and make improvements to your services where necessary. Through holistic integration of data, you can follow each client's journey through initial lead, factfinding, research, recommendations, and presentation, to implementation of advice and the final review process. By collecting data around your client services, you can refine your approach and begin to improve your business' structure and outcomes, from client engagement to annual revenue. So, how do you go about enacting digital transformation in your business?

## How we can make your digital transformation a success

As a business support company, we recognise the growing need for financial advice firms to adopt a more technological approach to their business structure. Where some advice-driven organisations can get bogged down with providing overly complex reports for clients, we're here to guide you towards a simplified approach to organising data and presenting it to clients, digitally, in a more meaningful and valuable format.

## Crunching the numbers

We believe data lies at the core of a digital transformation and it will provide us with factual evidence to inform, drive and measure change. While we review your data, we will also analyse the configuration of the CRM technology you have in place and attach a RAG status to each area of CRM functionality where there is an opportunity to improve its use or how it's been configured. Often finding discrepancies between what has been documented and what has actually been done, it is important to dedicate time to aligning the two to ensure there are no inefficiencies, duplications or manual processes to assess.

## Ongoing support, when you need it

When working with advice-driven firms, our main objective is to support them through their application of digital transformation. Not only a method of creating a client portal or replacing a few of your manual systems, digital transformation is a root and branch opportunity for you to reimagine your firm's entire business model, including cultural change as well as operational and client-facing improvements.

Successful adoption of digital transformation will leave you well placed to face the challenges of a fast-changing marketplace and ever-increasing client expectations.

## Understanding your business

At Jigsaw Tree, we always begin with an initial discussion, where we find out your firm's objectives, how you plan on innovating your business and the timeframe you have in mind. Once we have an overview of your business goals, we will begin analysing your firm's data.



To accelerate your firm towards a digital transformation, get in touch with Jigsaw Tree.

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