WISE INVESTMENT GROUP

jigsaw·tree
business improvement is a journey not a race

Re-evaluation of business processes

Picking the wheat from the chaff

Key Benefits

Consistency across the business

Teams are no longer working in silos and all staff have a view of what is required and links to other processes are made where necessary

Accountability

By mapping out individual processes it gives a clear view to everyone what needs to be done, by who and when

Visualisation of processes

Provided clear, easy to understand processes that all staff, current and new, are able to follow

Wise Investment Group is an independent investment company providing personal service and investment expertise to look after all of a client's financial affairs. Established in 1992, Wise has significantly increased in size over the years and, with that increase, comes the need to look at standardising processes. As with many organisations, processes are learnt from another member of staff or new ones are devised by individuals without necessarily looking at the bigger picture.

With the decision made that processes needed to be standardised, Wise started with the Administration functions and used Microsoft Word to help plan them. What they quickly saw was that these were not visual; were time consuming; didn't link with other processes; were constantly changing and were hard to maintain.

Wise realised they needed a process mapping system which was simple to use, intuitive and visual – but with the detail behind it. Through various internet searches and discussions, they contacted Jigsaw Tree

to show them Engage Modeler, an innovative online tool providing the ability to create and review business processes.

The original thought was that, after training, they would begin to map processes using Engage themselves, but it very quickly became apparent that, due to their day to day commitments, there was no time to put things in place. Processes, whilst incredibly important, far too often get pushed to the bottom of the 'to do' pile.

Once again, Jigsaw Tree were brought in to help them brainstorm and map their current high level processes. Having the processes recorded was the initial aim, but this ultimately made Wise question what they were doing, was it the best way and did they need to change. The conclusion was they did need to change the processes to make them more efficient and effective. With the help and input of Jigsaw Tree they have established a great starting point from which to re-evaluate processes and using Engage produce new ones that can be embedded into the company in a structured way.
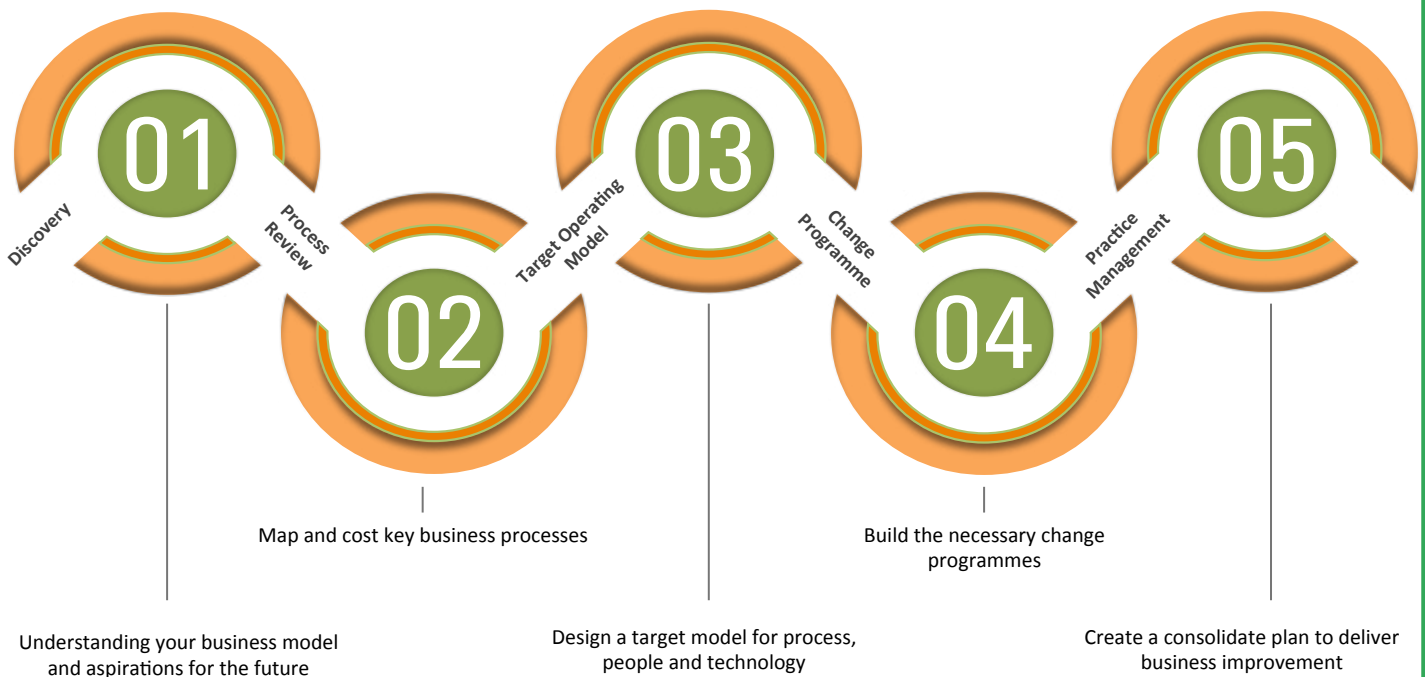
key services

- **Process Modelling software training**
- **Process Modelling Workshops**
- **Mapping high level processes**

'Mark at Jigsaw Tree has been great at leading us through looking at our existing processes, recording what we currently do and then revisiting them to see what needs to change to make them clearer and easier for us all. He has been the constant level headed person throughout the whole processes and is able to pick the wheat from the chaff in what we do'.

Heather Cooper-Harris
Technical Manager

![jigsaw tree logo](business improvement is a journey not a race)

Jigsaw Tree Client Engagement Lifecycle

01 Discovery

02 Process Review

03 Target Operating Model

04 Change Programme

05 Practice Management

Map and cost key business processes

Build the necessary change programmes

Understanding your business model and aspirations for the future

Design a target model for process, people and technology

Create a consolidate plan to deliver business improvement

Please contact us so we can discuss your requirements:

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