



Moving from Adviser Office to Intelliflo Office



<https://www.chantlerkent.co.uk/>

Key Benefits

Jigsaw Tree – Delivery of expertise to support the CRM transition

Knowledge of the market and back office solutions.

Keeping the project on track and in budget.

Taking the pain of change away from the business and supporting staff through the migration journey.



Without the expertise of all the Jigsaw Tree team we could not have completed the migration anywhere near on time. The team have ‘held our hand’ throughout the project and have made what could have been incredibly painful and stressful into bite sized manageable exercises. They continue to support whenever we contact them and we shall continue using their services for future training needs”.

– **Carmel Burke**
Operations Manager

Key Services

- Selection Advice
- Project Management
- Configuration – workflows, document designer, income transition
- Training, trouble shooting and Go Live Floor Walking

Chantler Kent had been using Adviser Office for about 15 years but with notice being given by IRESS the business had to change its CRM prior to March 2023.

The business agreed to move to Intelliflo Office in June 2022 following an initial discussion around requirements to ensure there was a good fit. The business began their transition to Intelliflo Office shortly afterward with a comprehensive project plan developed by Jigsaw Tree.

The role of Jigsaw Tree in this transition was to support from a project management perspective and provide advice and configuration work. Within Jigsaw Tree we have specialists in all areas to ensure that the needs of Chantler Kent could be catered for, from Compliance, Income, Workflows, Valuation feeds and Document Designer to name a few. Ensuring that the configuration and set up was correct from the outset meant that Chantler Kent were able to gain the full benefit of Intelliflo Office from Go Live knowing that they had best practice in place.

Jigsaw Tree provided both remote and onsite training in addition to Go Live Floor Walking and this accelerated the end users ability to have confidence in their use of the new technology from the start of Go Live.

Finally, our income specialists supported the business to ensure fee models and expectations had been set up correctly along with EDI providers to gain efficiency and reporting from the income area.



Please contact us so we can discuss your requirements:

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