



**Business improvement
is a journey not a race**

Business improvement is a journey not a race

Who we are?

Jigsaw Tree are a specialist consultancy and outsourcing business. We work in collaboration with Financial Advice firms to support and improve their operations by delivering a suite of services provided by the best professionals which add value and support the business requirements of the firms we partner with.

Our clients have the confidence that we truly understand the technology they implement, and we ensure they have the best possible outcome as we are uniquely placed with our:

- **expertise of the UK financial services sector**
- **expansive knowledge of the technologies available**
- **close working relationships with technology providers**
- **growing base of certified/accredited status**

Our agile virtual business model allows us to mobilise resources where needed and are supporting firms all over the globe, such as Hong Kong, Singapore, and Dubai.



Established in
2012

200+
years
combined UK
financial services
experience

100+
firms
supported
concurrently

Whether you are looking for help for your whole journey; a technology change transition from the initial review of your tech stack, selection, implementation, Go-Live and beyond or help with income reconciliation, template design and build. We have the required skills to support your business and guide you through change, no matter how big or small.



What we do?

By offering both consultancy and outsource services, we help our clients save time and money by optimising technology and business processes through:

- Technology selection & due diligence
- Technology implementation support & project management
- Business process mapping
- Income reconciliation
- Debtor cleansing
- Template design & build
- Database assessment
- Training (on site and online)
- Accelerator program - this program contains multiple components that allow a bespoke project to be created to enable our clients to embed more of their CRM's functionality, which will always include training.
 - Configuration and reimplementation
 - Client portal set up
 - Compliance set up
 - Fee models
 - Workflows
 - Client segmentation
 - Valuation feed set up

636
month ends
closed in 2021

Over
1500
processes
mapped

234
firms benefited
from the accelerator
program

Planning & business change services - complete operational support

With our tried and tested approach, we work with our clients to help them create a technology model to ensure they achieve their business goals with the right technology to support their future. Truly understanding our clients' current & future needs and benchmarking existing technology gives clarity as to the uplift in functionality that can be gained because of change.

The next stage in this is to ensure the implementation meets the requirement of our clients, we do this by working in collaboration with both our clients and the technology firm to ensure that key actions are completed to meet the all-important Go-Live. Using our in-depth knowledge of the technology firm means we can hold them to account along the way. Combining our project management skills and effective use of technology to support this project means that all parties have complete transparency on the plan and associated actions.

By using the best process mapping technology available and mapping processes to ensure our clients gain a 'one best way' of operating means that any configuration is completed with the right practices in mind. It is often our experience that our clients will look to take old processes with them into modern technology which creates inefficiencies from the start, and this is what we actively seek to change. The process mapping enables our clients to have a future view, by comparing old with new models and understanding the efficiencies savings that can be gained prior to implementation.



1000+ users
benefitted from
technolgy change

25 years
implementation
experience

Technology selection & due diligence

Advice firms must adapt to differentiate themselves from the competition and continue to grow whilst managing costs and risks. Technology plays a key part in that differentiation, but with so many key players in the market, it can sometimes be confusing and time consuming for an advice firm to investigate the options.

This service will help to drill into what is necessary and important to our clients which helps to ensure that any selected technology provider can deliver against their needs. Our discovery workshop deep dives into our clients' business to gain the right insights and requirements. When the question set has been tailored, we run this process against our clients' existing technology which provides a benchmark percentage, once this is completed by agreed technology providers; this gives a view as to the uplift our clients can expect to achieve.

We ensure our clients have an integrated target model defined with future-proofed technology that can support their business goals and objectives - a clear audit trail is delivered with every step fully documented for a comprehensive due diligent process.

It is our view that taking reference sites is critical to understanding exactly what our clients can expect helps to set the right expectations from outset. A clear set of questions are drafted prior to any calls so that key information obtained.

We understand the commercial models offered by the technology firms and support our clients in making sure they get best price for the services they will be receiving.



10+ years
selection
experience

Up to an
85% uplift in
functionality
improvements

Technology implementation support & project management

Selecting the right technology is just the start and now the challenging work begins; to support the successful delivery of implementation, our experienced project managers provide clear focus on the key milestones to ensure that the project is kept on track and the technology is configured and aligned to our clients operating model.

We use a leading online work and project management platform which has been rolled out to several technology firms to support the implementation. This, combined with making sure the right project governance is put in place, gives the project a good structure and oversight. This not only allows transparency for the project plan and associated actions, but also the ability to escalate issues quickly.

We work as part of our clients' team to support and guide during this transition from Day One to Go-Live and beyond. If the technology our clients select are well known to us, one of our team will provide floor walking as part of the service to support end users during the critical phase of Go-Live, giving them confidence in the use of the newly selected technology.



UK & International firms supported in this transition

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Planning, implementation, configuration, data migration, training, Go-Live



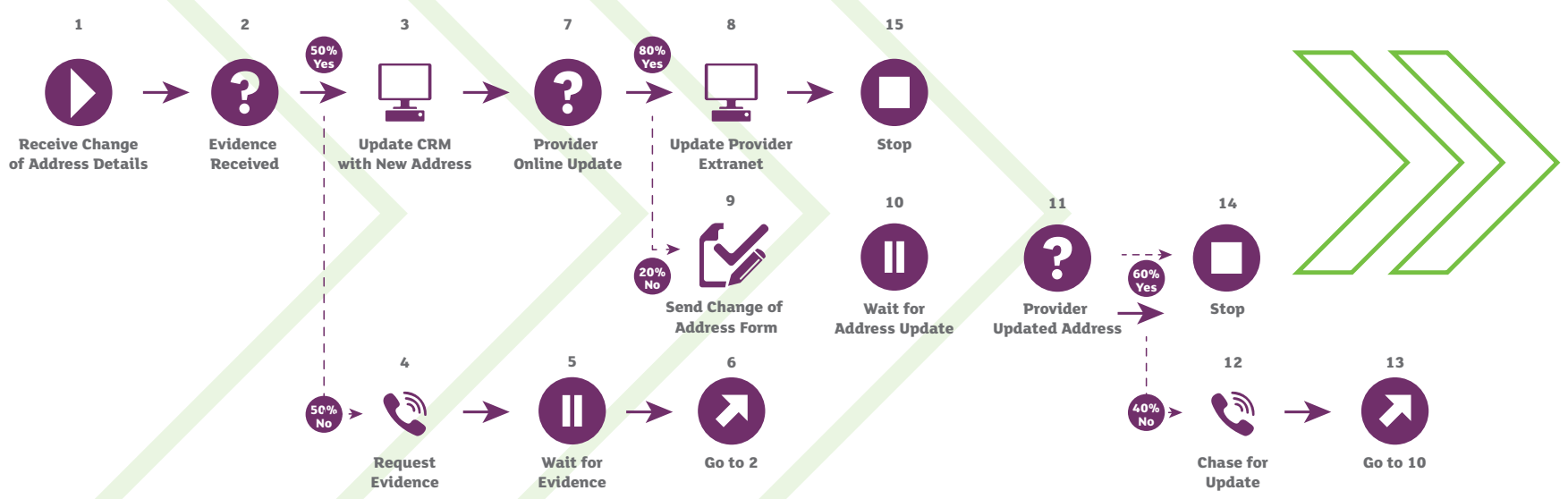
Business process mapping

In our day-to-day working lives, there are a whole series of steps we do to get our jobs done. Steps that we don't really need to think about. Have you ever looked at whether those actions are best practice, and what their actual cost is to your business? Jigsaw Tree helps advice firms review and improve their existing processes to achieve a 'one best way' of working.

This gives our clients a sustainable advice framework that can mitigate risk and show how a first-class service can be delivered to their clients. The benefits of process modelling are far-reaching, and we take immense pleasure from making a major difference to our clients by giving them better insights into their business and its working practices.

Often when we are mapping processes with firms, due to the pictorial nature of our selected technology it can bring together individuals or teams and can demonstrate how they get to an agreed single working model across the business.

We sometimes experience two people who may work side by side, but operate differently, this means that a consistent approach and standard service cannot be achieved, we bring these individuals together in collaboration. The effects and benefits of this service should not be underestimated. Where else can you compare two models and truly understand the operational benefits and efficiencies without implementing them?



Outsourced & technology services



Income reconciliation

Our Outsourcing Team have a wealth of knowledge in the leading CRM systems fee and income functionality, having worked alongside firms for over a decade, we know there is no problem that we cannot solve.

One of our USP's is that we have designed and built our own secure portal which means that any documentation uploaded is immediately put within a secure environment. That was Phase 1, we have now created Phase 2 which gives us the ability to convert several statements from PDF into a format that can be processed electronically. We are the only outsourced firm to be able to use our own technology to do this, which means that our levels of accuracy are the highest they can be.

We have developed an onboarding program so that every firm who outsources their income reconciliation receives the same level of service and a consistent experience. Once we are working with you in our BAU (Business as Usual) way, we will then hand you over to the team to support you on an ongoing basis.

We appreciate that each firm is different and may have different requirements, and to facilitate this, we create a Key Data Sheet to capture your needs so that this information is documented and available for the team to follow.



Template design & build

How you present your business to your clients is one of the ways that can make you different. Documents that represent your business and corporate branding delivers clear value in the way that you communicate and showcase the services you provide to your clients.

Use our expertise to create templates, suitability reports, fact finds and valuation reports that enable better outputs and automation for your business. We can rebrand standard templates that we have created or take a brief from you for a bespoke template. A discovery session with one of our specialists will ensure the best level of automation can be achieved based on the way that you choose to operate and configure your CRM solution.



If you want to be convinced as to the benefits, please read our case study >>>

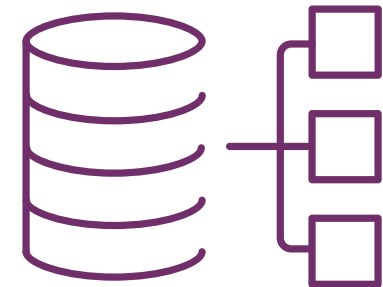


Database assessment

Understanding how your data is working for you and what decisions can be made as a result is all-important. Our database assessment looks how the CRM technology is working in your business using our RAG status, providing an extensive view of how well your CRM has been embedded in your business.

When firms are looking to engage with us, the database assessment really provides us (and sometimes the firm) with a great insight as to how their CRM is working in practice. We review 14 areas and each one will be given a RAG status depending on how our assessor views the way either, it's been configured or used in practice. This database assessment is shared, and a review call is set up to discuss findings and agree priority against your business needs.

Once those needs have been documented and signed off, we will create these into a transparent project plan that is delivered against. This plan is called our accelerator program and it is how we work alongside firms to ensure they can embed more of the functionality so that when the project is completed, the firm is left in a self-sufficient state, having been trained to make future changes as they arise.




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eAdviser
Champion



How can you become an eAdviser Champion on Intelligent Office?


www.frenkeltopping.co.uk

Key Benefits

1. Building efficiencies Ensuring efficiencies in working practices are harnessed through best practice methods which are adopted by the whole business.	2. Focus on key areas By outsourcing their income reconciliation, Frenkel Topping can ensure staff are now focused on key objectives of client service.	3. Clean Data Through data cleansing of key areas of IO Frenkel Topping can ensure all business processing is clear and concise, with accurate data.
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After using Intelligent Office for 18 months we came to the realisation that we needed help in re-implementing the technology to ensure we were gaining efficiencies in all areas. Jigsaw Tree's Project Work has allowed us to focus on specific areas of IO that needed better alignment and through a collaborative approach we now have a system that is delivering to our Best Practice.

— **Clare Harrison, Commercial Manager**
Frenkel Topping

Training

We believe that the best training is tailored for you and delivered in line with your business requirements, allowing users to put into practice what they have learnt immediately post training. Offering a blended method of learning means that we can train groups in their own environment, break down the training into bite size chunks or provide it via video, either as a pre cursor to training or a tool to back up what the users have learnt. This means that every step of the way users are supported in their learning needs.

Our trainers:

- will engage with you to drive the right learning outcomes
- provide a blending learning approach – face to face, online and video learning
- have a background in Financial Services
- are certified with several technology providers



Configuration & reimplementation

This service enables you to gain better adoption of the technology used within your business, we seek to gain understanding of current use by looking at your data and configuration and compare these to your business priorities.

Our database assessment reviews 14 areas and depending on your Priority Ones, these are created into a transparent project plan which is shared and delivered against. Where configuration work that has been carried out by us, we will provide training for users including super users, this will ensure your business has all the knowledge it requires to make any changes in the future.



This program is called the Accelerator, we walk alongside your firm supporting the areas where improvements can be gained, efficiencies made, and the adoption of the technology improved. We leave you in a place of self-sufficiency as a matter of good business practice.

Pennymatters
THE MODERN APPROACH TO
FINANCIAL ADVICE



cowgills | wealth



Our Clients

Kymin
Financial Planners

Chase de Vere



mazars



Brunsdon
FINANCIAL



Accreditations



Iress

We have worked alongside Jigsaw Tree with some of our clients for many years and their consultancy and outsourced services always receive positive reviews with the firms they work with. Chris and her team are professional in the services they deliver and incredibly passionate about supporting the firms they work with in the best possible way.

Alex Hore

Head of Client Solutions, UK



iO

We have been working in collaboration with Jigsaw Tree for over 10 years now and the support they provide to our customers is invaluable and the benefits are clear and tangible. They were the first to be a certified partner and are the only firm to have all aspects of our certification which means they can support intelliflo Office firms in their use of our technology well.

Richard Wake

Head of Country, UK

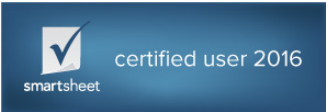


T4A

We have been working with Jigsaw Tree for quite a number of years now and I am always impressed with the way the team work hard for their clients, with an absolute focus on achieving the right outcomes for all involved in the journey. Chris Baigent-Reed is a true visionary, is extremely industry savvy and is passionate about helping firms transition to become more sustainable, profitable and valuable.”

Roland Rawicz-Szczerbo

Founder & Director



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your requirements:**

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