

Case Study – New Financial Advice Proposition



The Challenge

- Our client engaged with us to develop a pilot client service proposition including operational processes, selection of technology providers and the design and implementation of an operating model.
- We agreed to use our experience and expertise to develop and launch the new proposition for the targeted client segment to validate the clients proposal.



Our approach

- We initially agreed with our Client to introduce a number of resources with previous industry experience in the launch of new client propositions.
- We then proposed the design of the end-to-end client journey mindful of the client requirements for speed of delivery and use of existing technology and systems architecture.
- As part of this we documented and agreed the data design of the CRM system and integration of this with the existing IT infrastructure.



Our Impact

- With a history of delivery of similar projects, our client approached us to advise on this proposition pilot as they viewed our input as critical to the proposition's success.
- The use of consultants with significant experience enabled a relatively small team to define and build end-to-end client servicing capabilities with full operational processes to support this new proposition.
- 6 Weeks timescale from initial engagement to launch including all operational processes, regulatory approval and business readiness.

Delivered Benefits

8
Interfaces

240%
Client Take on Target

6 Weeks
Timescale from
concept to launch

Scalable Operating Model