

# Vision Wealth Ltd Case Study

## At a glance

A comprehensive project undertaken for Vision Wealth Ltd, a professional Financial Services and Investment company, aimed at optimising operational efficiency and providing essential administrative and IT support. The project encompassed continuous planning and administrative assistance, office management, financial administration utilising Xero, invoicing and financial data processing, IT support, staff travel management, and corporate event scheduling.

## OBJECTIVES



- Reduce the Managing Director's workload by providing continuous planning and administrative support.
- Facilitate efficient day-to-day operations through office management and financial administration.
- Ensure accuracy and detail in processing invoices and financial data.
- Provide reliable IT support for hardware and software installation and troubleshooting.
- Optimise staff travel arrangements to identify cost-effective options.
- Schedule meetings and corporate events with exceptional organisation and planning skills.

## PROCESS



- **Continuous Planning and Administrative Support:** Offered ongoing assistance to the Managing Director to streamline workflow and alleviate administrative burdens.
- **Office Management:** Managed day-to-day office operations to ensure a smooth and productive work environment.
- **Financial Administration Using Xero:** Utilised Xero for financial administration tasks, including invoicing and data processing, ensuring accuracy and efficiency.
- **IT Support:** Provided comprehensive IT support, including hardware and software installation and troubleshooting, to maintain smooth operations.
- **Staff Travel Management:** Coordinated staff travel arrangements, researching and identifying the best available options to minimise costs.
- **Corporate Event Scheduling:** Scheduled meetings and corporate events with meticulous attention to detail and exceptional organisational skills.

## RESULTS



- Successfully reduced the Managing Director's workload, allowing for increased focus on core business activities.
- Ensured efficient day-to-day operations through effective office management and financial administration.
- Maintained accuracy and precision in processing invoices and financial data, minimising errors.
- Provided reliable IT support, ensuring uninterrupted operations and minimal downtime.
- Optimised staff travel arrangements, resulting in cost savings for the company.
- Scheduled meetings and corporate events seamlessly, enhancing overall organisational efficiency.