

## CLIENT STORY:

# Aspira



## Customer profile

Aspira Corporate Solutions Ltd was founded in 2003 near Bristol. We provide financial planning services to businesses and individuals throughout the UK, but particularly specialise in corporate pension and benefit schemes.

Our aim is to deliver exceptional advice and service and to grow assets under advice along with recurring income streams.

We have an excellent culture and are driven by our vision which focuses on people, customers and the business with the aim of driving a win/win solution for all parties. As such we are an 'Investors in People - Champions' and have been since 2011.

“

*We feel the Personal Finance Portal is an excellent way of communicating with our clients, it reduces the cost to serve and improves client interaction with us*

**Matt Chidgey**  
IT and Facilities, Aspira

## Business challenges



To find an efficient and cost-effective way to communicate with our clients



To significantly reduce time in areas of the business that were resource heavy



To produce meaningful and up-to-date management information reports

## Intelligent Office delivered



Our business on one system, where all the different elements integrate with each other



An excellent channel through which to communicate with our clients



Time and cost savings through the elimination of duplication

Our previous system had become disjointed resulting in us becoming much less productive. We were struggling to achieve efficiencies in reporting and had to re-key in the same information to perform a number of essentially simple tasks, i.e, fact finds, quotations and online applications.

We therefore started to look for a system that could link our document management system, financial planning tools and our wrap platform as well as drive efficiencies from back office processing through to the client-facing parts of the business.

“

***Using iO has enabled us to reduce time and cost factors across the board.***

**Andy Chidgey**  
Operations Director

**ASPIRA**

**We looked at a number of different solutions, and chose Intelligent Office (iO) as we felt:**

- ✓ the team would give us superior support when changing from our existing system. We found them to be friendly and knowledgeable both of iO and the financial services industry.
- ✓ the Personal Finance Portal would give us a modern, secure channel through which to communicate with our clients. It would reinforce the Aspira brand as well as reducing printing and postage costs and helping us meet regulatory requirements for information security.
- ✓ The cost of servicing clients would reduce due to time saved in streamlining various business processes. In particular, reducing duplication of data entry due to integration with the tools we use e.g. quotes portals, financial planning tools etc.



Intelligent Technology for Financial Services  
0845 230 3900 | [www.intelliflo.com](http://www.intelliflo.com)

**Intelliflo**