



**Business Improvement  
is a journey not a race**

 **Straightforward Solutions**

 **Clear Thinking**

 **Value For Money**

 **Risk Reduction**

## **HELPING ADVISERS ACHIEVE THEIR BUSINESS GOALS**

**Jigsaw Tree delivers a suite of services to help Adviser businesses to grow their revenues, reduce costs, improve client satisfaction and minimise business risk.**

Our offering is based on a set of values we believe help to ensure we deliver the right outcomes for our clients.

We would not be where we are now as a business without Jigsaw Tree. They helped create a suite of standard processes and their advice has had a really positive impact on how we use Technology in our business.

**John Lawson, Director, Fiveways**



**Business Planning  
and Strategy**



**Proposition Design**



**Marketing  
Programmes**



**Technology Selection,  
Implementation and  
Adoption**



**Business Process  
Management**



**Income Reconciliation  
Outsourcing**

In our experience firms often lack time and resource to maximise technology, refine business processes, market their innovative practices and produce meaningful management reports. With our help they can begin to focus on the vision for their business. Working closely with them, Jigsaw Tree can create and deliver a plan to build an operating model that helps support a sustainable business.



Revenue management is the life blood of a financial services business. At Greystone we process approximately 180k revenue transactions per year. Accordingly, this function needs to be robust and performed accurately on a timely basis. The considerable expertise and experience of Jigsaw Tree together with their passion for business process improvement has enabled us to achieve the benefits detailed above within a short timescale.



**Keith Horner, Finance  
Director**

**Please contact us so we can  
discuss our requirements:**

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