

AT8 InfoBlog – IntelliFlo

Company Overview

IntelliFlo is one of the fastest growing suppliers of technology to the Adviser market place. Their core offering - Intelligent Office - is an online based Back Office solution for Adviser firms sold as a SaaS (Software as a Service) model.

IntelliFlo originally developed a Back Office solution in 1998 for the IFA network, Inter-Alliance when they were a wholly-owned subsidiary. Shortly after Inter-Alliance merged with Millfield Group in 2004, IntelliFlo became the subject of a management buyout and is now privately owned by the management team lead by Nick Eatock and Jamie Coats.

At the last company accounts posting (2008), they had a turnover of approximately £5.128m with a profit of £1.573m. They have approximately 50 employees based in Kingston upon Thames and have over 6,000 users.

Product Overview

Intelligent Office is a Microsoft based, web-centric solution. It has been developed using an underlying solutions architecture called 'Open Indigo' that allows Service Orientation.

It is a true SaaS application and comprises a single database instance for multi-user tenancy - it is a pure 'Online' solution.

This purity and strength of the IntelliFlo vision as a SaaS provider remains a key differentiator in the market, gaining them many users who don't want to manage any hardware themselves. It also gives IntelliFlo significant benefits, to their own business model, including speed to market, high profitability, plus good annuity revenue streams.

The Intelligent Office system has a large range of features including Fact Find, Research Tools, Suitability Letters, Client Management, Workflow, New Business processing, Management Information, Compliance, Risk-based File Checking, Document Management, Lead Management, Tasks/Diaries and Commissions Management

IntelliFlo have launched both a new mortgage sourcing system (in partnership with DPR) and a new set of financial planning tools this year.

Solution Strengthens

SaaS model
Established proven solution
Rich Back-Office Functionality
Configurability
Ease of Implementation

Key Clients

Major clients include:

- Honister (The Money Portal)
- National Australia Group
- Principality
- Derbyshire FS
- Foster Denovo
- M2 Group
- Threesixty
- Sense
- Bluefin
- Lighthouse
- SimplyBiz

Solution 'Sweet Spots'

IFA Firms whether small, medium or large
IFA networks
Mortgage / Financial planning
Hybrid firms and Networks
Situations where speed and ease of implementation are important

Important Notes

The AT8 InfoBlogs are designed to give a brief précis of the key technology suppliers to the distributors of financial services. They are designed for users to gain a quick background on companies and their solutions prior to starting on a formal IT review or supplier procurement. They contain information that is publicly available combined with an expression of opinion formed from AT8's experience of dealing with the leading companies in the market. We make every effort to ensure the information is accurate at time of publishing the InfoBlog, but due to the dynamic nature of the information, it should be confirmed prior to any formal decision being made.

The InfoBlogs are a basic start point that can help in gaining context when considering your e-commerce needs.. It is likely that further opinion or information about each supplier will be needed prior to short listing or selection and AT8 will be happy to help address individual needs with its wealth of additional information and experience. AT8 also has a clear and fast methodology for procurements that has been proven to save time and money as well as improve the outcome of the decision.

If you would like to discuss this InfoBlog further or would find value in an InfoBlog on a supplier not currently published then please contact us at marketing@at8-group.com or telephone 0121 314 2504.

About AT8 Group

AT8 Group is an innovative consultancy company with knowledge, skill and experience across a broad range of Financial Services and IT related disciplines.

Our experience of working with providers, intermediaries, lenders and IT companies puts us in a strong position of understanding needs and opportunities. Our skills allow us to use our knowledge along with our ability to innovate and proactively to create and implement differentiated business improvement propositions that add tangible value to our financial services' clients and partners. In addition, we supplement our own knowledge with current market data from research agencies such as Datamonitor with whom we have a strong relationship and access to their Financial Services Knowledge Centre.

Specific areas of expertise for AT8 include

- E-Commerce Strategies
- Point of sale and Back-Office solutions, including portals
- Procurement and negotiation
- Sales and Marketing strategies
- Financial services Regulation
- International market analysis

AT8 can support and add value to the full lifecycle of a project from the initial idea generation to operating the project and eventually reviewing and renewing the project.



AT8 Group Limited, Gate House, 10 The Elms, Leek Wootton, Warwickshire, CV35 7RR
Telephone: + 44 (0) 121 314 2504 Facsimile: + 44 (0) 870 4794074
Email: marketing@at8-group.com Web: <http://www.at8-group.com>