



Chapter 6:
How we
support you

Working together

How Bankhall worked with Firm C to optimise their operational design

About Firm C

Firm C is a nationwide financial planning business, specialising in all aspects of financial advice, investments and retirement planning, for high-net-worth, professional and corporate clients.

Overview

From assessing functional structure to maximising the firm's use of technology, Firm C approached Bankhall to feed into and challenge its operational design, to ensure the business was future-ready.

Results

£250k

Reduced costs by **c. £250,000 per annum** for just one business function.

17%

New advice journey efficiencies led to **17% increase in suitable file grades** within 12 months of working with Bankhall.



Improved **customer outcomes**.



New operational processes, developed to enhance operational efficiency while maintaining robustness.



A more focused business function with relevant skills, accountabilities, and responsibilities.

Looking to the future together

Bankhall continues to work with Firm C in a number of areas, including customer journey, taking a wider view of the business to explore how efficiencies can be enhanced across the business.



Sesame Bankhall Group

Bankhall PMS