



Chapter 6:  
How we  
support you

# Working together

## How Bankhall worked with Firm A to streamline their operational design

### About Firm A

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

### Overview

Having undergone a merger, Firm A approached Bankhall for support with streamlining the operational design of a key function within its group.

## Results



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



Introduction of automated and repeatable processes leading to **improved customer outcomes**.



Enhanced flow of management information through technology delivered **better oversight and decision-making ability**.



**Improved cultural alignment** of where two businesses have come together, aligning business processes and procedures across the group.



Reduced costs of **c. £310,000 per annum** in a single business function.



Reduced professional indemnity (PI) insurance costs of between 20 -25% a year, **at least c. £180,000 per annum**.

## Looking to the future together

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



Sesame Bankhall Group

Bankhall PMS