

# Working together

## How Bankhall worked with Firm B to restructure their operational model

### About Firm B

Firm B is a large, national financial planning business specialising retirement planning.

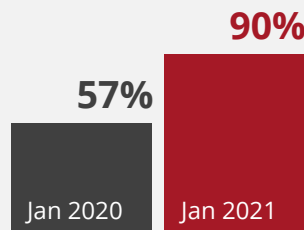
### Overview

Firm B approached Bankhall for support with defining a more efficient business structure, and to streamline the firm’s customer journey, advice processes, and use of technology.

### Results

#### Improved file review grades

Increased the number of suitable grades achieved by 33% in just one year.



#### Enhanced customer journey

- The firm’s end-to-end customer journey has reduced.
- Technology enhancements reduced time spent on the fact-finding process.



#### Cost-savings enabled streamlining

- Resources redeployed to relevant support areas (including admin, paraplanning, triage).
- Advisers enabled to focus on the customer.



#### Improved customer experience

- New technology facilitated customer self-service.

