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CASE STUDY - LOYAL NORTH

From fragmented systems to a single, consistent way of working

THE CHALLENGE

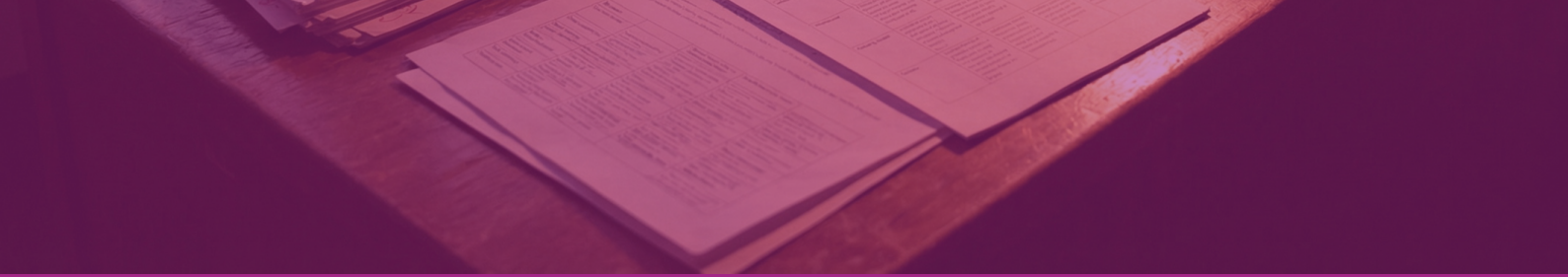
When Stuart Pittaway looked across the Loyal North group, he could see that Intelliflo Office — the platform each firm was using — was telling a different story in each office. Multiple separate instances had been set up and left to evolve in isolation, resulting in firms working in entirely different ways, recording different levels of data, and getting inconsistent results from a system that should have been a unified business asset.

With no consistent configuration strategy and staff who lacked the depth of knowledge to understand what the software was truly capable of, the platform was being significantly underused. Processes had grown organically rather than by design, which meant Loyal North had no reliable framework for delivering a consistent client experience across the group — an increasing concern in the context of Consumer Duty obligations and the FCA's expectations around demonstrable client outcomes.

THE SOLUTION

Adviser Outsourcing worked closely with Stuart and the Loyal North team to understand the firm's objectives, existing workflows, and the gaps between current system configuration and business reality. From this, a structured programme of work was developed covering two key workstreams:

- **Configuration alignment** — a thorough review and realignment of Intelliflo Office to reflect the business structure, client categories, service propositions and workflows.
- **Business process mapping and implementation** — designing, documenting and embedding clear, repeatable business processes directly within Intelliflo Office so the system could actively support the team's day-to-day activity.



A key priority throughout was building staff knowledge and confidence. Rather than simply reconfiguring the system and handing it back, Adviser Outsourcing invested time in training the teams across Loyal North's firms — ensuring they understood what Intelliflo Office was genuinely capable of and how to use it effectively in their day-to-day roles.

Four core advice journey types were then designed, aligned and embedded within the system:

- **Ongoing client review** — a consistent, repeatable workflow to support the annual review process across all firms.
- **New client onboarding** — a structured journey from first contact through to becoming a fully established client on the system.
- **Ad hoc advice** — a clear process for managing one-off client advice cases in a controlled and compliant way.
- **Implementation of recommendations** — a defined workflow for progressing advice through to implementation, reducing delays and improving consistency.

Alongside the journey mapping, Adviser Outsourcing also focused on integrations — connecting Intelliflo Office with valuation feeds and other third-party software to streamline operational processes and enhance the management information available to the leadership team across the group.



THE RESULTS

The transformation has given Loyal North something it didn't have before: a single, consistent way of working across the entire group. Where each firm had previously operated in its own way, there is now a shared framework — aligned processes, properly configured systems, and staff who understand how to use it properly.

The core advice journeys — onboarding, ongoing review, ad hoc advice and implementation — now run consistently across all firms, reducing the risk of steps being missed, data being incomplete, or client experiences varying depending on which office is handling the case. This directly supports Loyal North's obligations under Consumer Duty, providing a more auditable and demonstrably consistent service to clients.

The integration work has meaningfully reduced the manual burden on staff. With valuation data and other third-party software now feeding directly into Intelliflo Office, advisers and support teams spend less time on data entry and administration — and leadership has far greater visibility of what is happening across the business, with management information they can actually rely on.

Perhaps most importantly, staff across the group now have the knowledge and confidence to get the best from the system — and the business has the operational foundation it needs to scale.

"We had multiple firms all using Intelliflo Office in different ways, and it was creating real inconsistency across the business. Adviser Outsourcing didn't just fix the configuration — they took the time to upskill our people and build processes that everyone could actually follow. We now have a system that works the way our business works, and a team that knows how to get the most from it."

— **Stuart Pittaway, Loyal North**