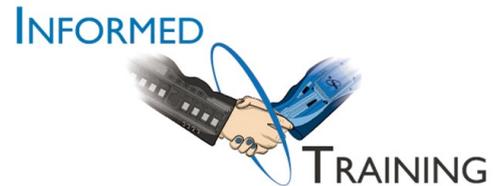


CERTIFIED PARTNER PROGRAMME: **Informed Training**



Who is Informed Training?

The company was founded by Eileen Murphy who has enjoyed over 30 years' working experience in the Financial Services Industry.

These are the foundation principles that we adhere to in all areas of services that we provide, helping our clients save time, improve communication, and share information in one place, to help them deliver the service they promise to their clients.

“

*Tell me and I will forget,
show me and I will remember,
involve me and I will understand.*

Confucius

Why Informed Training?



We believe that the overall principle is that any training or service delivered is not only an investment of money, but also time for our clients, and therefore, should add

value to their business. We ensure that the client generates a real rate of return on their investment and that change happens.

Can you afford not to ensure your business management system is working effectively for you and your team?

If you answer yes to any of the questions below, then we can help you.

- Do you wish to achieve a better return from your investment on your Intelligent Office business management system?
- Do you wish to ensure that your system is being used to meet the service promise you have with your clients under RDR?
- Do you wish to save time, reduce duplication, and ensure that you are sharing information all in one place?

Let Informed Training help you make your day a little easier.

Please feel free to contact

eileen.murphy@informedtraining.co.uk,

or call us now on **0121 357 5944**, or check out

our website **www.informedtraining.co.uk**

to see how we may be able to help you and your team.

A case study on Brunel Capital Partners



Who are Brunel Capital Partners?

They are a firm of independent financial planners and financial advisers. They take time to understand their clients and their goals to achieve financial independence, financial security, and peace of mind. They build lifetime relationships based on trust and integrity. They are truly independent and act only in their client's best interest.

How did Brunel contact us?

In May 2012, Damien Rylett, Managing Director of Brunel Capital Partners, contacted Informed Training through our contact page on our website www.informedtraining.co.uk

What was the client's overall objective?

In summary, Damien Rylett, Managing Director, wanted a bespoke training programme on Intelligent Office that would help him and his team to build on the existing knowledge they had gained directly from Intelliflo. Also with expansion to his team, new users also needed to be trained.

What were their training requirements?

They were keen to embed more fully the use and great functionality of Intelligent Office, applying it practically to benefit themselves and their clients. By ensuring they use their CRM system with a more streamlined approach to their overall business process implementation, Intelligent Office is utilised much more effectively.

What was the solution that Informed Training provided?

Design of the Service - Following discussions with Damien and the team, I was able to identify the current knowledge set, key objectives and areas of need, prioritise what should be tackled and time frames, and act upon this, ensuring changes were made.

Delivery of the Service - The journey commenced in July 2012, with a bespoke course. Designed to provide interactive practical hands-on training which they could continue to use on a daily basis on their system.

Client Feedback

Following delivery of the training, we gathered feedback. This activity compels us to continue to do what works well for the client, and to make changes for improving the whole client experience as we continue the journey. Here is the testimonial which Damien kindly posted on LinkedIn.

“

“My business engaged the services of Eileen Informed Training to provide bespoke training to new employees on Intelliflo's Intelligent Office web-based business management system.”

“Eileen has taken a great deal of time to understand our business and our aspirations before delivering her sessions. The sessions have always been delivered in a very professional and enthusiastic manner. She has a vast knowledge of the system and her attention to detail is second to none. I have no hesitation in recommending Eileen as a service provider but also as someone who WILL make a difference to your business.”

Damien Rylett - Financial Planner | IFA
November 27, 2012



Continuing the journey

We build on the foundations set with our clients and personalise a review strategy that matches their changing needs.

Just as systems evolve, so do the needs of our clients and to this extent, we are delighted that Brunel Capital Partners continues to gain value from engaging our bespoke services. We are proud that Damien and the team continue to utilise their already efficient system even more effectively on a continuing basis, with the help of Informed Training.