iO Implementation & Training Services

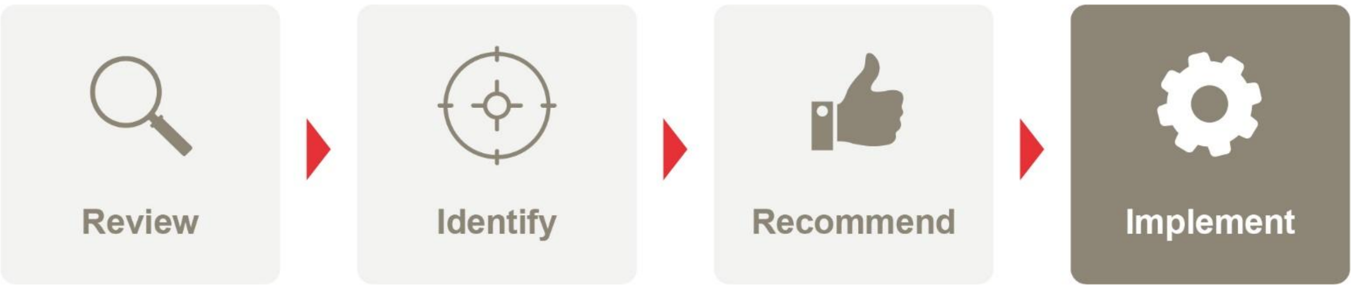
Release Date: **12 November 2025**

Project Objective

Circadian will carry out an initial evaluation to identify areas where you are not optimising your use of Intelliflo Office.

Making recommendations, where required, to ensure you are working in line with best practice.

This review will be carried out free of charge, we will provide you with a report that will include recommendations, next steps and a plan of action.



Service Schedule

Target Subject	Review Objective	Implementation Goal
Client Data & Missing Key Information	Identify areas of client (Individual, Corporate & Trusts) records on IO with blank or inaccurate data. E.g., Contact details, NI number, DOB.	We have identified missing data as per the above and it is our recommendation to review the missing data and add into Intelliflo Office as this will give you improved efficiencies and MI outcomes.
Clients by Service Status	Review whether a firm is using the service status functionality. Evaluate clients without a service status.	Update the service status within Intelliflo Office.
Clients Registered with PFP	Identify clients not using PFP	Increase the number of clients using PFP.

Target Subject	Review Objective	Implementation Goal
Income	Review the setup of fee & income reconciliation within IO. Including – Cash receipts, electronic statements, unallocated and fee expectations.	Implement an IO income reconciliation process.
Fee Models	Evaluate current fee model set up on IO, including mapping to service status.	These should be aligned to your proposition and can be mapped against the appropriate client service status to ensure the correct fee model is available for selection.
Advisers	Analyse adviser set up with compliance, alongside T & Coaches. This could include bandings, bank details and IO access levels.	Advisers should be setup correctly within Intelliflo Office as this information shows who is responsible for a client along with who provided the advice.
Life Cycles	Does the life cycle configuration match the firm's expectation? These are used to determine the stages a plan transitions through along with the ability to implement rules to enhance the recording of specific data. They are also used to aid with the Compliance / File checking behaviour.	Could the life cycles be enhanced to improve consistency and the quality of data inputting. We can assist you with configuring these for your business needs.
File Checking and Adviser configuration including risk setup.	Review the file checking setup / configuration within your tenant.	This area of Intelliflo Office configured to meet your file review requirements.
Workflows	A Workflow can guide a user through a process by way of creating a series of tasks which can either be created manually or automated.	This area of Intelliflo Office configured to your workflow requirements.
Service Cases	These can be used to report on and track a piece of advice.	This area of Intelliflo Office configured to your service case requirements.

Target Subject	Review Objective	Implementation Goal
Task Management	Tasks are used to support the throughput of work within Intelliflo Office, providing a clear audit of client work undertaken.	This area of Intelliflo Office configured to your task management requirements.
Bulk Valuations	Ensure all bulk valuation data is matching and valuing iO plans	
Real Time Valuations	Provide business with guidance on registering for real time valuations i.e. Unipass set up/additional registration steps	Ensure that all plans eligible for real time valuations are included in automated adviser valuation schedules. Provide business with real time valuation failure analysis and recommended steps to correct any issues.
Bespoke UDMI Reporting	Create additional UDMI reporting to make plan valuation analysis/issues easily identifiable	

Configuration

We can also assist you with configuration in the following areas:

- ✓ Fee Models
- ✓ Compliance (file checking configuration), Lifecycles, Adviser Configuration and Risk
- ✓ Dashboards / Widgets
- ✓ Deletion Rights / User permissions
- ✓ Integrations
- ✓ Service Cases
- ✓ Task Management
- ✓ Workflows

intelliflo Office CRM Review Service Costs

Service	Rate
Review & Recommend	£73.00ph (+VAT)
Implementation	£550.00 per day (+VAT)

We aim to keep our pricing structure as simple and transparent as possible and make every effort to keep additional costs down.

Please Note: Some project reviews may require an overnight auto match process and, therefore, may be split across more than one day.

Non remote consultancy days will incur standard travel expenses.

Circadian will use its reasonable endeavours to ensure that the agreed service standards are exceeded in the normal course of its business.

If you require any further guidance with the information in this document, please contact using the details below:

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