



# Openwork

## Rapid, agile CRM deployment for Openwork Financial Advice Network

### Summary:



Deployed amidst evolving requirements and business growth



User-focused, agile development approach



Centralised system for efficiency, consistency and compliance



Customised portals and apps to suit various stakeholder needs across differently branded firms



Full-scale deployment underway in phases to over 650 advice firms

### The Challenge:

#### A centralised system to support many local variants

Openwork is a diverse network and experiencing strong growth, thanks to both its own adviser training programme and the addition of new firms joining its network. The organisation had outgrown its legacy business recording & submission systems. With the network and its customer base continually expanding, Openwork's challenge was to scope and deploy a customer centric system that could keep pace with growth and change during the project.

A key reason for moving to a new system included controlling the rising cost of administration in this heavily regulated sector. Ben Revill, Financial Services Business Manager, explains: "Openwork needed to identify suitable technologies, systems and suppliers to support the full range of advice

and servicing processes for wealth management and mortgage advice, including Know Your Customer, suitability and client servicing."

In addition, Openwork's forward-looking network firms were keen to digitise and automate more of their administration processes and offer self-service and account visibility through customer portals. Openwork was keen to embrace the potential of the latest customer-friendly technologies and scale easily for continued growth in its network, whilst maintaining robust security and compliance.

### The Solution:

#### Responsive, agile deployment to accommodate user needs

Openwork reviewed the available specialist and off-the-shelf solutions and chose Microsoft Dynamics 365, because it offered a highly flexible and integrated platform for its diverse and expanding network. From a shortlist of recommended service partners, they chose Xpedition to guide and support them in the customisation and deployment of the cloud-based solution.

To validate that Dynamics 365 is the right platform for Openwork's needs, Xpedition developed a proof of concept, including a customer portal and a robust security model which was demonstrated to a selection of the Openwork network's advisory firms. With capability established and positive feedback from the trial, the challenge was on to develop the full solution to meet a diverse set of requirements posed by the network. For example, since more than one firm in the network may deal with the same customer for different purposes, it's vital to secure and segregate centrally held customer data.

In partnership, the Xpedition and Openwork teams identified that this complex and rapidly changing network environment demanded an agile implementation methodology for

configuration and deployment. Working in sprints, Xpedition consultants collaborated with Openwork's IT and Business Analyst teams to deliver the functionality needed, as determined by a large number of user stories.

The project progressed rapidly, through various iterations, flexing to incorporate new network members, agreed key design decisions and opportunities to improve the advice process. The customisation and configuration was adapted to accommodate the different interdependencies, products and service requirements of the network's adviser groups. And the methodology was also flexed through the phases to optimize the ways of working and coordinating a broad range of skills and activities from analysis and design through configuration to integration, data migration, deployment and training.

Some aspects of the build and migration weren't compatible with the Agile approach. For example, data migration, integration and portal development had to be managed in a more rigid framework. The Xpedition team combined the Agile and traditional approaches to ensure rapid delivery that was controlled and secure.

**"The Microsoft Dynamics 365 platform provides the flexible and proven functionality that Openwork needs for market-leading customer experiences and robust security and compliance. It includes seamless integration with existing Microsoft office systems, KPI reporting and analysis, and comprehensive data access via its open API which is complemented by Microsoft's Logic Apps and other Azure services."**

Craig Woodhouse, Technical Consultant, Openwork

Openwork is one of the largest financial advice businesses in the UK, with a strong shareholder base and a professional community of more than 3,600 financial advisers across the Group. The Group comprises over 650 advice firms, ranging from a few staff in a single office through to multi-branch firms with over a hundred staff. Different firms across the network offer a range of services and specialisms, from investments and pensions through to mortgages and protection.



**“The combination of an agile development approach, the flexible and future-focused Dynamics 365 technology and our team of highly experienced and responsive consultants has delivered the platform and capabilities Openwork need to serve their customers in the digital age. The requirements are complex, with the size of the Openwork network and constant change and growth, along with stringent security and compliance needs. The Xpedition team has risen to Openworks unique challenge to provide the organisation with the efficiencies and flexibility needed to support ongoing growth and customer loyalty, served up on a trusted, world-class platform that offers far more adaptability and potential than a bespoke financial services solution.”**

Dean Carroll, General Manager, Xpedition

**The Results:**  
**Effective customer management for a fast-evolving and diverse business**

Openwork has a proven and effective product deployed in an early adopter or pilot tranche of 12 firms. More will be added as the system rolls out over the next 2 years. When complete, there will be 5,000+ users in more than 650 advice firms in the network, supporting over one million clients. Each Openwork network member has a customised portal along with core customer management and financial advice functions, plus adaptations to fit their different business models.

Microsoft continually invests in enhancing the Dynamics 365 platform: during the rapid Agile deployment, Openwork has been able to take advantage of new features emerging, as well as embracing new network user needs that surfaced during the sprints. The Dynamics 365 platform means the development team could configure application functionality in a low code environment, with custom code or plugs-ins where D365 native functionality is not appropriate. This responsive approach enabled agile and user-centric customisation within one consistent, controlled technical platform.

**About Xpedition**

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver. We're known for our questioning nature and for challenging the status quo. We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalizing client experiences and improving operational efficiency. At Xpedition, we'll show you the way.

**Fast-track your journey to CRM success with Xpedition.**

**To learn more about Xpedition visit:**  
[xpedition.co.uk](http://xpedition.co.uk)  
**Or contact us on**  
**+44 (0)20 7121 4705**

**46 Worship Street**  
**London**  
**EC2A 2EA**