

## Case Study, Financial Sector

### Challenge

Robson Lister are a wealth management company based in Sutton Coldfield in the West Midlands. Since 2001 they have provided financial planning advice to a variety of clients, as well as acquiring several other local wealth management companies along the way.

e-days were approached by Robson Listers' practice manager, who had previously used e-days at Lloyds Banking Group, as she wasn't happy with the manual paper and spreadsheet processes, she had inherited.

It took a great deal of time to keep all records up to date across a great number of team spreadsheets and, as with any manual process, was open to human error.

### Solution

When it came to sourcing an online solution, the practice managers experience of e-days meant that we were of course under consideration, however due diligence and a consideration of other suppliers was required by the business as procurement best practice.

Robson Lister felt that what stood out about e-days was the greater number of features available to simplify an organisations absence management processes, such as automated detailed reporting, Overtime & TOIL tracking and minimum staffing level automation.

Robson Lister also felt that the usability of the web-based application, coupled with the transparency around its pricing structure made it the clear favourite amongst other solutions.

### Impact

The implementation of e-days has successfully streamlined all leave tracking and absence management processes within Robson Lister, saving a considerable amount of time and money associated with the administration of absence.

Robson Lister were also particularly pleased with the dedicated implementation manager they were assigned at the time of signing up, they felt it helped to correctly understand their needs and build their system around these needs.

Since launching Robson Lister have also commented on the quality of support they have received, responding to queries quickly when required.



## ROBSON LISTER WEALTH MANAGEMENT

19 e-days users

### e-days functions used:

- ✓ Holiday booking
- ✓ Reporting
- ✓ Long service awards
- ✓ Team calendars
- ✓ Overtime & TOIL

### e-days Financial Sector Clients:

- 4 Finance
- M&G Investments
- Barclays
- Moneycorp
- Standard Bank



*From the time I was assigned a Consultant, I felt confident that the e-days solution would be right for us.*

*Gabby's confidence in the system he was promoting was evident throughout and his approach was not to 'sell' the system to me, it was to provide me with as much information as I needed in order for me to decide whether e-days would meet our needs.*

*During our communications I was given the time I needed to trial the system with regular contact to check on how I was progressing yet, despite many emails and conversations, I was never once pressurised into signing up.*



### Practice Manager

Robson Lister