

# Intelliflo Enables Next-Generation Financial Advice With Splunk Enterprise



## Executive summary

Intelliflo is a provider of web-based software and support to the financial services industry, enabling clients to streamline the way they deliver wealth management advice to their customers. The company provides solutions to one-third of the U.K. financial advisor market, with over 19,000 users managing over £300 billion in assets. Intelliflo wanted to improve access and visibility to data across its software infrastructure, enabling it to understand and improve the client experience. Since deploying Splunk Enterprise, Intelliflo has seen benefits including:

- Greater understanding of software usage
- Enhanced software development process
- Improved client support capabilities

## Why Splunk

As the provider of multi-tenant SaaS solutions, Intelliflo needs to ensure reliable delivery of its solutions to its clients. Prior to Splunk Enterprise, the company used multiple tools to troubleshoot software issues, with access to machine data spread across disparate tools and siloed solutions with little integration. This impacted client experience, with problems taking time to identify and resources being occupied that could have been better allocated to product development in such a competitive landscape.

Intelliflo recognized that in order to achieve a balance between performance and innovation, it required a holistic view over all of its machine data. With Splunk Enterprise, Intelliflo now has centralized access to all company machine data, enabling real-time software troubleshooting for clients, complete operational visibility over all product usage as well as an improved capacity for product development and performance management.

## Real-time insight into client health scores

Intelliflo employees have access to a client health score that is generated through Splunk Enterprise. With a range of client machine data inputs, Intelliflo generates a series of metrics that combine to

### Industry

- Technology

### Splunk Use Cases

- Application Delivery
- IT Operations
- Business Analytics

### Challenges

- Difficulty getting access to real-time data across infrastructure
- Lack of unified tools slowed down product development
- Inability to open up data access to individuals across the business

### Business Impact

- Better ability to manage client turnover
- Improved client-centric software development process
- Faster mean time to resolution with access to real-time data on user activity and problems

### Splunk Products

- Splunk Enterprise

produce a score that gives detail into how effectively its solution is being used. This score is then integrated into Salesforce to segment Intelliflo's clients, identifying both upsell opportunities and those clients at risk, and helping to reduce turnover.

### Enhanced software development process

Splunk Enterprise supports the entire Intelliflo software development process. The product development team utilizes reports and dashboards to guide debate and discussion internally about future product changes, relying on the empirical data available to help determine the best course of action. The real-time visibility into client usage provided by Splunk Enterprise then allows for changes to be monitored so that management can determine whether the overall experience has improved. Collectively, this means the Intelliflo product set is evolving at a far quicker pace than would have been possible previously, helping the business to stay at the forefront of innovation.

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**“Splunk Enterprise is a window into our business analytics and allows us to see our data in real time, helping us to more accurately shape business priorities and software development pipeline. We are at the point where our management team is debating major business decisions using Splunk dashboards.”**

**Hamish Purdey, CEO**  
Intelliflo

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### Operational Intelligence transforms support effectiveness

To deliver quick and effective client support, Intelliflo has empowered its first line support team with access to Splunk Enterprise. Through a series of established dashboards, the first line support team can directly view a client's profile and its associated log data. This enables the team to quickly understand the issue and address it directly, without having to transfer to other lines of support. This not only improves the client experience with faster resolution times for problems, but saves resources previously allocated to second and third line support.

“Splunk Enterprise is a window into our business analytics and allows us to see our data in real time, helping us to more accurately shape business priorities and software development pipeline,” says Intelliflo CEO Hamish Purdey. “Splunk data drives our business decisions and our management team is routinely using Splunk dashboards for key product and customer insights.”

Download Splunk for free or get started with the free cloud trial. Whether cloud, on-premises, or for large or small teams, Splunk has a deployment model that will fit your needs.



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