



# Continuing Success: How A Financial Services Company Found Value in Partnership



## ABOUT THE CUSTOMER

Key Group was established in 1998, as one of the UK's first equity release advisory services. The company offers its customers a full suite of financial products to take the hassle out of financial planning. Key Group specialises in offering solutions for those in or approaching retirement.

## INDUSTRY

Financial Services

## HQ

Preston, United Kingdom

## CUSTOMER SINCE

November 2017

CVS Customer - December 2018

## COLLABORATIVE SERVICES

Continuous Value Services

Training



## POST-PRODUCTION SUPPORT GOAL

Over the past 18 months, The Key Group has leveraged Collaborative Solutions Global Continuous Value Services (CVS) consulting, supported by both local and global resources to ensure the right strategy is executed at the right time. The CVS service included key functional enhancements, strategic optimisations as well as end-user training and general upskilling of the Key Group team to increase self-sufficiency.



## WHY COLLABORATIVE

Collaborative was the obvious choice as Key Group's CVS partner following the success of their initial Workday deployment that was achieved together. They were happy to opt for the team with a proven track record of success.



## BENEFITS & RESULTS

- Migration of acquired companies Ledgers onto the Workday platform
- Gained insights and meaningful data from Advanced and Composite Reporting to help drive business decisions.
- Significantly reduced manual input and automated the data flow, such as Bankline direct automated payments, Supplier Self Billing and multiline supplier invoice generation through complex purpose-built integrations.
- Reduced manual input and automated the flow of data by introducing fund accounting solution including source system integration.
- General Ledger reconciliation tracking functionality

*"We feel we have a true partnership with Collaborative Solutions in respect of ongoing CVS support. They have the breadth and depth of knowledge of the Workday ecosystem that we need and are able to deploy high calibre resource to us promptly when the need arises. With CS on board we are able to continue to realise the efficiency opportunities that our initial implementation presented." - John Kilbride, Head of Finance Systems*