



Joint venture

CASE STUDY

"RQ gives us a bomb-proof process for partner revenue sharing. We can now protect our partners, clients, and business, all while making advisers' lives easier."

STUART GALLACHER
HEAD OF OPERATIONS



SUMMARY

Cheetham Jackson uses RQ to run safe, visible, and scalable partner referrals across its joint venture network.

RQ closes compliance gaps, removes double entry, and gives partners and head office live visibility of referrals and revenue - protecting partners while supporting growth.

60+

Joint Venture
relationships on RQ



Compliance
gaps solved



Integrated
with Intelliflo

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BACKGROUND



Cheetham Jackson is a large financial planning firm built on long-standing joint ventures and introducer relationships with accountancy and legal firms.

Over more than 15 years, CJ grew a substantial partner network, driving a steady flow of referred clients. As the network expanded, managing referrals, revenue sharing, and compliance became increasingly complex for a small central team.

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CHALLENGE

The Monday.com disconnect

With around 65 active joint ventures, CJ managed referrals in Monday.com, which did not integrate with Intelliflo Office (IO). Advisers re-entered data manually, information fell out of sync, and partners had limited visibility into lead progress.

Regulatory gaps and rising risk

Audits by the AAT and ICAEW exposed weaknesses in how ongoing revenue sharing was monitored. In some cases, partners were required to seek retrospective client consent and refund revenue.

Referrals stalled

Confidence was shaken across the network. Concerned about regulatory exposure, several partners paused referrals altogether.

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SOLUTION

RQ

Integrated referrals, no double entry

CJ replaced Monday.com with RQ, which integrates directly with Intelliflo Office. Referrals flow straight into advisers' existing workflows, with updates shared back automatically.

Compliance built into the process

RQ embeds disclosure, consent, and ongoing monitoring into every referral. Every penny of revenue is tracked with a clear audit trail, restoring confidence and removing risk of clawbacks.

Clear oversight for all parties

Partners can see referral progress in real time. Head office has firm-wide oversight. RQ provides a process that protects clients, partners, and the business.

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IMPACT

RQ's disclosure workflows neutralised referral restrictions following AAT and ICAEW audits, restoring confidence to the firm and its introducers who had paused activity to start referring again.

RQ replaced a £24k-per-year CRM by integrating directly with IO, eliminating manual double entry and saving the team valuable time each week.