

# CASE STUDY

*"With RQ, advisers only need to focus on Intelliflo and the information is automatically shared with our joint venture partners."*

**EMILY ROBERTS**

**JOINT VENTURE DEVELOPMENT MANAGER**

**CHEETHAM JACKSON** 

## SUMMARY

Cheetham Jackson runs an Intelliflo-first referral process across its joint venture network using RQ, replacing Monday.com with a single workflow.

RQ removes double entry for advisers, improves compliance, and gives live visibility into each referral.

60+

**Joint Venture**  
relationships on RQ



**Compliance**  
gaps solved



**Integrated**  
with Intelliflo

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## BACKGROUND

**CHEETHAM JACKSON** 

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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## SOLUTION

**RQ**

### Intelliflo-first referral process

RQ replaced Monday.com with a single referral workflow integrated directly with IO. Advisers work in one system, with referral capture, visibility, and partner updates handled automatically.

### Cleaner data with less admin

Referrals are created as leads and only convert to clients after a first meeting. This improves data accuracy, and eliminates duplicate data entry.

### Built-in compliance

RQ enforces a structured referral process with a clear audit trail. Both the firm and its joint venture partners follow the same workflow, reducing reliance on informal communication and individual judgement.

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## CHALLENGE

### Fragmented referrals

Referrals came via multiple channels – email, phone, text, and directly into Monday.com – making volumes difficult to track and referrals hard to manage.

### Duplication, poor visibility, and unreliable reporting

Advisers had to enter referrals into both Monday.com and Intelliflo. Updates were often missed, and reporting on performance was unreliable.

### Compliance risk and cost

Informal referral methods created gaps in audit trails and relied on individual behaviour. Monday.com cost £14k per year, and didn't provide compliant referrals.

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## IMPACT

### Clear visibility, cleaner data, and lower cost

CJ has real-time visibility of all referrals. Using IO correctly improves reporting, while removing Monday.com saves £14k+ /year in unnecessary costs.

### Less admin for advisers

Advisers work in Intelliflo. RQ manages referral capture, tracking, and updates, removing duplication.

### Consistent and compliant partner workflow

JV partners all follow the same process. Referrals are captured in a structured, compliant, auditable way.