

AMP planners and specialists were finding the knowledge libraries, which they depended upon to operate, difficult to navigate. Often content was hard to find and not current, causing downstream workflow and customer experience issues. AMP were offering a less than best practice service to their sales channel who were free to move to a competitive organisation better positioned to enable them.

Overview

AMP are the largest financial planning network in Australia (Money Management 'Top 100 Dealer Groups' July 2011) and have operated for 160 years. With an extensive network of licensees and licensee support services AMP have a portfolio of comprehensive offerings which can assist financial planners or practices achieve their business goals. AMP's focus areas include innovation, choice and support, for its base of planners. AMP's licensee and licensee support network includes AMP Financial Planning, Hillross, Charter Financial Planning, Genesys Wealth Advisers, SMSF advice, Jigsaw Support Services and IPAC.

AMP Financial Planning supports its network of independent financial planners with a team of AMP specialists who work closely with each planner to ensure they are well informed about products, services, processes and regulatory requirements. AMP specialists and planners are dependent upon two knowledge libraries, one accessed by the planners and the other by the specialists.

AMP Financial Planning needed to increase the ease of use and content quality of these libraries by making them more engaging and relevant, ensuring they supported the business requirements of the users.

The Problem

Both the AMP planners and specialists were finding the knowledge libraries difficult to navigate. Often content was hard to find and not current, causing downstream workflow and customer experience issues. The library owners were also finding the existing systems cumbersome to update and operate. Overall, AMP were offering a less than best practice service to their channel who were free to move to a competitive organisation better positioned to enable them.

The Solution

NetReturn Consulting worked closely with a team comprising of AMP specialists, independent financial planners and AMP Financial Planning head office to define in detail the profiles of each end-user group, and the tasks and activities that each needed to perform using the AMP knowledge libraries.



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NetReturn Consulting developed a deep understanding of each end-user group, the tasks & activities that each needed to perform, using the AMP knowledge libraries.

An enhanced design was developed to guide the creation & repurposing of the knowledge libraries, to meet user requirements.

With a deep understanding of the end-users, NetReturn Consulting were able to define an intuitive taxonomy and site structure for both knowledge libraries which mapped the proposed site structures to the existing sites and delivered a recommended design to guide the creation and repurposing of the knowledge libraries. A detailed project plan was also developed along with costs, projected savings, user benefits and timelines for implementation.

Business Benefits

The improvements to the AMP knowledge libraries have resulted in increased satisfaction and use by AMP financial planners and specialists. Feedback from users indicates that they are deriving greater value from the revised knowledge base, are much more engaged with the AMP business and believe their future with AMP is bright. Planners and specialists have a stronger relationship with each other and planners are more able to deliver accurate, timely and competitive proposals to their clients.

In addition, the taxonomy, navigation and site structures delivered by NetReturn Consulting enable AMP to develop, upload and manage content with ease, growing an information-rich knowledge base on which their channel depends to be successful.



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AMP planners & specialists are able to offer clients accurate, timely & competitive proposals, underpinned by improved knowledge libraries.

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