

# Quantios

Escaping legacy systems, BTG operations are streamlined for agility and growth.

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**BTG** | TRUST & CORPORATE SERVICES  
MAURITIUS



 Port Louis

# Spotlight on BTG Mauritius

BTG Trust and Corporate Services Mauritius ('BTG Mauritius') is a full-service Management Company in Mauritius. BTG Mauritius provides formation, administration and management services for global business license companies, trusts, foundations, partnerships, and protected cell companies. They pride themselves on providing excellent service. Their Trust and Corporate administrators have access to Group-wide accounting, legal, international tax, and wealth management professionals, many of whom have more than 20 years of experience.

“Quantios NavOne quickly became indispensable, it is tailored specifically for our industry and the issues we face.”

**Boris Pelegrin**

Managing Director, BTG Mauritius

BTG Mauritius provides a range of highly specialised services including formations, administration and management services for global business license companies, trusts, foundations, partnerships, and protected cell companies.

Established since 2013, the firm is internationally highly respected and has a growing team of Trust and Corporate administrators plus tax and wealth management professionals, many of whom have more than 25 years of experience. BTG Mauritius has been using NavOne from Quantios since 2018 to streamline every aspect of running day to day business operations. This includes client administration, maintaining statutory records, management of trust companies, regulatory risk and compliance management plus onboarding and enhancing client relationship management.

## Becoming indispensable

Common to the wealth management sector, BTG Mauritius invoices clients on a 'time utilised' rather than project basis and requires all team members to complete detailed timesheets on an ongoing basis. NavOne's time sheet processing and practice management tools make what could otherwise be an arduous task very straightforward, enabling the firm to accurately bill clients and maximise their revenues. "NavOne quickly became indispensable, it is tailored specifically for our industry and the issues we face, so the team are on it all the time, documenting any client information that changes," states Boris Pelegrin, Managing Director at BTG Mauritius.

Before introducing the automated workflows and centralised client management included within NavOne, BTG Mauritius had their business data stored across multiple databases and spreadsheets. This meant reporting could become very complicated and it was easy to confuse the client information required for a particular task. Now data is stored in a single, highly secure database within NavOne and because the software fully integrates with all Microsoft tools, creating pivot tables in Excel or exporting into Word has become very simple.

"Quantios NavOne is core to our business and we use it on a daily basis for absolutely everything, from payment processing and accounting to administrative functions and tracking key items - trustee protector administrators and bank addresses for example."

**Boris Pelegrin**

Managing Director, BTG Mauritius

“Over the years Quantios has consistently demonstrated they are a fantastic strategic technology partner..the account management is excellent, they always deal with support requests quickly and are very responsive whenever we have an issue”

Boris Pelegrin

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“Working together using the Quantios project delivery framework we have achieved a high level of efficiency in a very short period of time - and look forward to gaining additional benefits in future.”

**Boris Pelegrin**

Managing Director, BTG Mauritius

## Centralised database ensures security, privacy and efficiency

Since implementing NavOne, BTG has observed that service efficiency is vastly improved, which in turn means quicker service turnaround times, faster billing cycles and higher profit levels. “Although NavOne is designed to handle complex transactions and reporting requirements, it is straightforward to navigate after some basic training so even our less technologically minded colleagues get the hang of it quickly,” adds Boris Pelegrin.

Adhering to strict process protocols and observing regulatory compliance is essential and BTG are diligent about holding trustee and board meetings, during which queries about stakeholder records can often arise. Using NavOne, any questions can be answered instantly, it is easy to check transactions were recorded and then issue reporting statements. “It is so helpful to have the data we need for trustee and board meetings at our fingertips, there is almost always a client query that needs investigating urgently or we need the ability to quickly understand statutory data,” says Boris Pelegrin.

## Customisation supports high degree of account personalisation

Risk ratings are another key requirement for compliance purposes and NavOne provides the ability to risk-rate individual transactions, identify UBOs and then demonstrate exactly which assets are under management and where investments are located. “The sheer weight of data required by regulators has increased significantly. When we had information stored in multiple places, it took a long time to compile reports and we would lose system accuracy, now we have a very sophisticated, centralised way of managing client information”, says Boris Pelegrin.

Another key benefit of using NavOne is the time it returns to senior directors, which means they can devote more time addressing our clients' complex technical issues and delivering additional value rather than worrying that back-office admin and compliance needs to be double checked. BTG Mauritius has created built in workflows for all key processes and the reporting facility within the software keeps management informed and confident the team is working accurately and efficiently. The ability to pre-configure workflow processes within NavOne also makes recruitment and expansion easier. Due to the firm's location, staff turnover can be high and being able to bring in new team members to handle day to day tasks without disrupting business as usual is an important benefit.

## Automated reporting

Looking to the future, BTG Mauritius will be migrating their systems onto the cloud and see this as being central to enabling further international expansion. Quantios will definitely be a key part of the company's long term technology roadmap. "We rely very heavily on using NavOne to run our entire operation, without it we would be pretty stuck. Over the years Quantios has consistently demonstrated they are a fantastic strategic technology partner, the account management is excellent, they always deal with support requests quickly and are very responsive whenever we have an issue," says Boris Pelegrin.

## Also available

BTG Mauritius  
Video Case Study



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