

Quantios

Digitalisation enables New Zealand Public Trust to profitably scale.

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 Wellington



Spotlight on New Zealand Public Trust

Public Trust is a Crown Entity whose independence is guaranteed under the Public Trust Act 2001. Their Māori name, Te Tari Tiaki Iwi, translates as 'the organisation that takes care of people'. Public Trust was established in 1873 to provide independent and reliable trustee services. Today they have over 300 employees operating from 24 customer centres and a number of part-time and appointment only sites across New Zealand. They provide services to three core customer markets:

Personal

Public Trust manages around 4,000 trusts, 800 estates and administer or manage nearly \$3.5 billion in assets, including around \$1 billion in investment funds.

Business

Public Trust manages over 400 charitable trusts, which generate funding for interests as diverse as science, medicine, disability and agriculture.

Corporate

Corporate Trustee Services offers some of Australasia's best-known institutions a full range of trustee services across a diverse range of products.

Established since 1873, Public Trust New Zealand has a long tradition of looking after the interests of its clients. Providing services to three core markets, Personal, Business and Corporate, Public Trust exists to provide independent and reliable trustee services throughout New Zealand.

With such a long-standing reputation for excellence, when the market dictates the need for change, the challenge is clear; how to move with the times, without damaging your reputation for excellence?

“Over the last three years Public Trust has gone through significant transformation”, say Glenys Talivai, Chief Executive Officer at Public Trust. “To do this we needed to be re-organised around the customer and to have a modern IT platform that supported a modern, customer centric view. Quantios NavOne has been critical to our digital transformation. It’s a specialist trust package that integrates all the requirements of being a trustee company into a highly useable package”

As an organisation with offices based in the hearts of communities with long standing relationships, Public Trust recognised the

need to build a new, customer centric way of working. Quantios NavOne was implemented to bring this capability into the organisation.

Scaleable and deployable

The existing two decade old system needed to be updated, which is where Quantios technology was able to help. “Now that we have a modern technology platform, which is integrated with our Microsoft applications, we are confident we are going to be well supported both today and into the future.” says Matt Sale, General Manager Retail. “The ability for us to engage with our customers through digital channels and create a seamless multichannel experience is huge. We did not have that before - there was no way that we could’ve scaled all our legacy technology in that way.”

“A desire for continuous improvement has led New Zealand Public Trust to introduce Quantios 5Series, an expert trust administration solution, which is transforming the way the company now manages trust operations for clients”

Glenys Talivai

CEO, Public Trust New Zealand

“Quantios NavOne
has transformed the
digital engagement
we have with our
clients, creating
a seamless
multichannel
experience”

Glenys Talivai

CEO, Public Trust New Zealand

“We were very careful not to try and re-engineer what is already world-class software. By and large we adopted the approach and software of NavOne rather than try and adapt it to our existing workflows.”

Matt Sale

GM Retail, Public Trust New Zealand


The choice of vendor is absolutely critical when it comes to installing a new IT platform. We have found Quantios to be very knowledgeable and they have consistently provided added value to our organisation, throughout the implementation of NavOne. Of course, when you roll out a new IT technology taking staff on the journey is a major success factor.

The internal transition

“It was a very significant shift from a 25 year old system to a modern technology platform and a huge change for people” relates Glenys Talivai. “What we’ve done principally as a way of engaging our people is to ensure our vision is understood, and that this vision is directly linked to why we sourced the product that we did. We believe the solution we chose is best suited to our role as a trustee provider.” Public Trust have also undertaken an intensive training program across the business, making use of the extensive modules available from Quantios throughout implementation.

Internal champions

Public Trust provided some of our employees with extensive training to create a group of users with a higher skill level than the average. They were known as “Champions,” states Matt Sale “and we invested in their personal leadership capabilities to ensure they understood their role and how to support other users throughout the transition.”



“As a leading trustee company we consider risk control frameworks to be of paramount importance to our organisation. Having the integrated structure Quantios provides we are able to easily meet our obligations”

Glenys Talivai

CEO, Public Trust New Zealand

Key to the successful transition to NavOne was the ease with which staff transitioned to the new software and processes. “Obviously there was a bit of nervousness at first”, says Principal Trustee Natasha Williams, “but in general I found the transition quite easy. The fact that we had comprehensive training, removed the anxiety around moving from an old system to something new, and unfamiliar. However, Quantios NavOne is a very logical system to use. Because of this, it’s been easy to work out what the next steps in any process are, and how everything links together.”

Public Trust have worked hard to ensure that data accuracy during the transition has been a key success area. “One of the things we are making sure that the team understand is “right first time” -so our data-quality, accuracy of accounting information and the establishment of the client file is paramount” says Matt Sale. “Another key area has been instilling discipline and reporting principles that ensure we have this correct from the start - and Quantios NavOne has enabled us to do that ” adds Matt.

Customer focus

Quantios has given Public Trust the ability not just to continue their day-to-day operations, but to expand. “We have the ability to take on more tasks and more activities because of the way the system is set up. We’ve also got complete confidence that we can complete these activities” states Natasha. With key Quantios benefits such as the transparency of the process users are able to realise ‘start to finish’ views within a live system and provide more up-to-date information to customers. “This is key” continues Natasha, “providing on-demand information to our customers is improving our customer focus - we are responding to customers as and when they make the request rather than taking 24 hours to get back to them, for example”.

Glenys Talivai adds “As a leading trustee company we consider risk control frameworks to be of paramount importance to our organisation. Having the integrated structure Quantios provides we are able to easily meet our obligations.”

Right first time with real-time information across the organisation - a true digital system



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