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CASE STUDY

Delta's Platinum SSAS~Pro technology helps to boost growth and increase productivity for Sestini & Co



As a boutique SSAS practitioner and trustee based in Bristol, **Sestini & Co Pension Trustees Ltd** provides bespoke pension administration services to support those who wish to take control of their retirement plans.

The company prides itself on providing a personalised service to each and every client, working hard to truly understand both their retirement planning and business aspirations.

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OVERVIEW

Having grown the SSAS business organically over time, carefully prioritising service over volume, Samantha Hayward, Head of Pensions Operations at Sestini & Co was keen to adopt specialist software to underpin future growth ambitions. With nearly 200 SSASs at the time, she believed that the business had reached the point where it should invest in technology rather than keep simply adding to her team.

Sam was acutely aware the optimum time to adopt a SSAS administration system was before the business grew any further, ensuring client service levels were maintained during the implementation phase. She therefore set about a search for the best SSAS administration software with her list of 'must-have' features to hand.

SITUATION

After exploring the SSAS technology available, Sam selected Delta as its Platinum SSAS~Pro was the only technology on the market that met all of Sestini & Co's requirements, which were:

- ✓ **Cloud deployed** – no internal IT costs and her team can access it from anywhere, meaning that she can easily employ remote workers
- ✓ **'A one stop shop for all data.'** – one record-keeping tool used as the source of truth for the entire team
- ✓ **Full SSAS functionality** – property, loans, investments and bank transaction records alongside full HMRC reporting
- ✓ **Automated fund split calculations and BCEs**, saving the need to employ a new benefits specialist and freeing up more of Sam's time to grow the business
- ✓ **Worklog measuring service against SLAs**, with work easily allocated amongst the team.



Whilst there are other providers who build their own systems – we are pensions technicians and not technology developers. We therefore want to focus on what we do best, and use technology to 'outsource' the things which need heavy lifting.

– Samantha Hayward, Head of Pensions Operations,
Sestini & Co Pension Trustees Ltd



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SOLUTION

From the point of signing contracts, Delta's team of onboarding specialists were able to implement Platinum SSAS~Pro within a matter of a few weeks. By working closely with Sam's team to fully understand their business model and to provide guidance on the optimum means of transferring client data, Sestini & Co were quickly fully operational. Key outcomes for Sestini & Co were:

PRODUCTIVITY

Sestini & Co can now do much more without needing to expand the team. Delta's solution has enabled the business to grow by 100 SSASs a year, as opposed to just 60 previously – Platinum SSAS~Pro has become like another staff member.

REDUCING RISK

Having a central system for all data and automated processes significantly reduces Sestini & Co's dependency on individuals within the business, helping it to reduce risk.

TRANSPARENCY

Using one platform provides Sestini & Co's wider team with full visibility of the latest scheme/member information, transactions and historical records. SSAS~Pro looks so good that the team also use it to screenshare with clients to walk through their data.

TRUSTED PARTNERSHIP

Sam and her team love the fact that everyone they speak to at Delta has SSAS domain experience and believes that "working with Delta is a true partnership based on knowledge and trust. As a smaller SSAS provider, to have people that get your business is huge. With Delta, you can raise your hand and someone is always there to help."

CREDIBILITY

Delta's technology and 27-year history is highly regarded within the industry for its functionality, reliability and scalability so Sestini & Co can be safe in the knowledge they've partnered with genuine market leaders.

4 weeks implementation time

Sestini & Co were fully operational on Platinum SSAS~Pro within four weeks of contract signing

66% increased capacity

Using Platinum SSAS~Pro has led to a two-thirds increase in operational capacity

RESULT

The impact of Platinum SSAS~Pro on Sestini & Co's business has exceeded both Sam and her team's expectations. **They can now do more with the same number of employees**, with operational capacity increasing by two-thirds compared to prior levels.

What's more, some of the more complex and time-consuming processes are now automated which **enables Sam and her team to focus on more value added client activity**.

To top it off, **the entire team loves using the platform due to its simplicity** and intuitive system design, giving them visibility of work in progress by others in the team.

Sestini & Co see Platinum SSAS~Pro as a significant investment in their business that **has improved operational efficiencies**, enabling them to grow whilst controlling costs and help position them as a reliable and resilient partner in the SSAS market.

FUTURE

With Sam's ambition of carefully growing Sestini & Co's SSASs under administration without compromising their high service standards, she views Delta as a trusted long-term partner, has fully embedded Platinum SSAS-Pro and built strong relationships throughout the Delta team.

The application now sits at the heart of the business facilitating controlled growth, with new team members seamlessly onboarded with the help of Delta's training videos and first-class client support available. Sam is also looking forward to using Delta's digital portal, iFreedom to give clients and advisers real-time access to data, and to further streamline processes with new straight-through Banking functionality.

The Platinum pricing model is structured to be aligned to Sestini & Co's future growth and importantly, inclusive of all future regulatory change, enabling Sam to focus on what she does best, which is providing an excellent service to her clients.



SAMANTHA HAYWARD

Samantha Hayward, Head of Pensions Operations at Sestini & Co Pension Trustees Ltd, said:

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I'm delighted with both our interactions with Delta and the impact that Platinum SSAS-Pro has had on our business. I'm always struck by the attentiveness and depth of interactions with everyone at Delta – they get my business and that is huge for me. SSAS-Pro quickly became a fantastically intuitive, living tool, right at the heart of everything we do, delivering considerable productivity, risk and efficiency benefits and helping drive controlled growth. The fact that we're now able to onboard and administer 66% more clients a year and have a credible solution underpinning our services, backed by the Delta team of domain experts, really helps bake in much needed scale and trust – something which is incredibly important to both us and our clients.

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