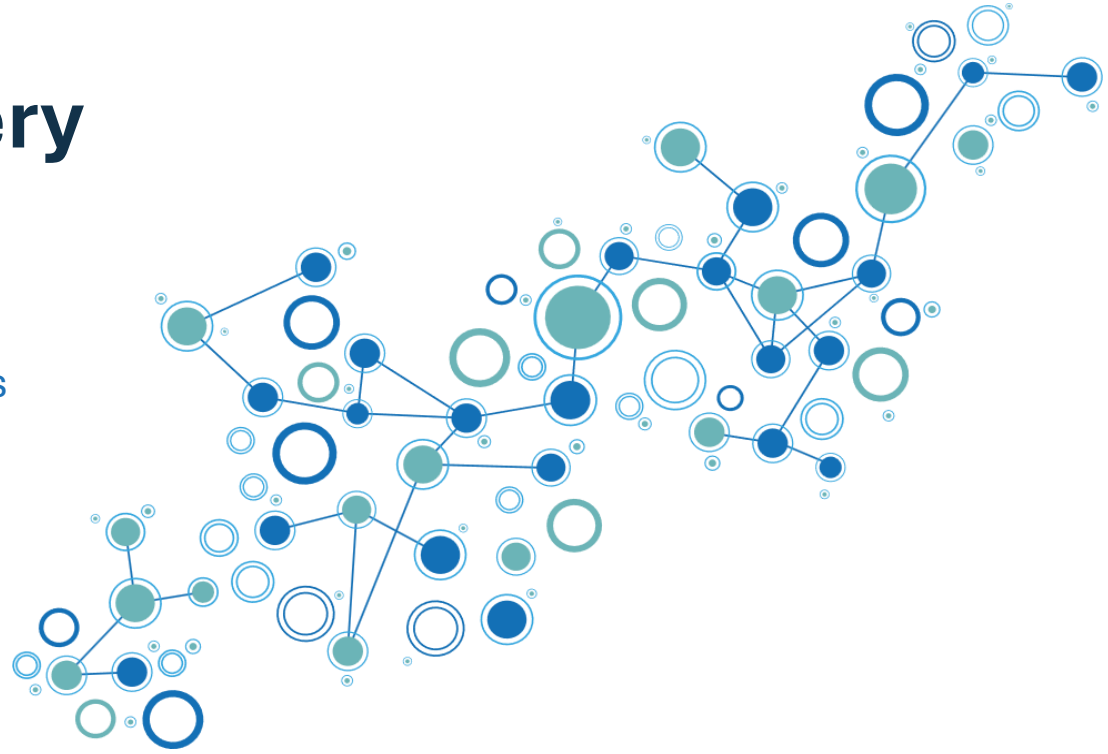
mintblue mb consulting

Business transformation delivery



Independent transformation leadership for Financial Adviser firms to mobilise your business, lead delivery and embed the outcome.

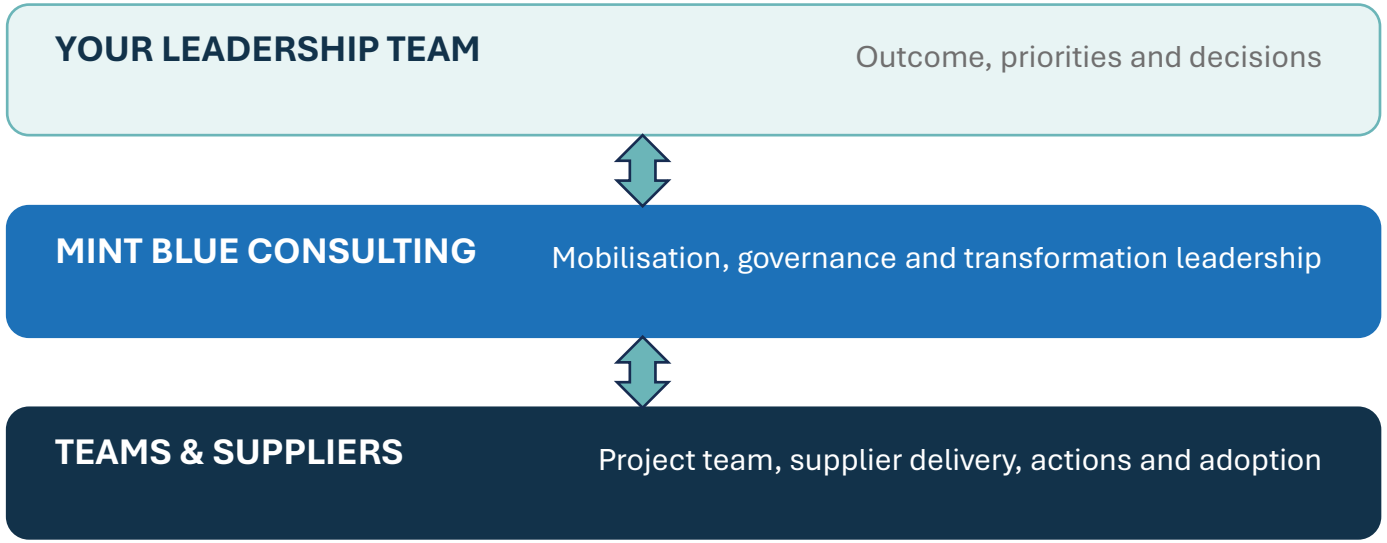
STRUCTURE. RESTRUCTURE. IMPLEMENT.

Independent • Your transformation partner • Outcome-focused

OUR ROLE

The independent business transformation lead

Mint Blue Consulting works for the firm's overall outcome, connecting board intent, operational and technology reality and supplier delivery



THE VALUE: Business transformation - turning your requirements and board priorities into embedded business change.

Management Consultancy to Projects – independent I Experienced I Flexible I Practical

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SERVICE MENU

Choose the support your firm needs

Select a focused consultancy assignment, a defined delivery project, or tailor chosen services around your priorities.

PROJECT CONSULTANCY

Create clarity and structure before full delivery

01 **Target Operating Models**
Innovating roles, processes, governance, AI and technology & ROI.

02 **Technology Stack Reviews**
Review your tech stack as AI helps streamline your business.

03 **Project Structuring**
Define scope, workstreams, governance, resources and plan.

04 **Project Guidance & Assurance**
Independent challenge, reviews and practical support.

TRANSFORMATION DELIVERY

Mobilise the business, lead delivery and embed the outcome

05 **Proposition Implementation**
Turn your propositions into new ways of working.

06 **Business Readiness & Technology Implementation**
Readiness, ownership, testing, pilot, rollout and adoption.

07 **Operational Acquisition Integration**
Join up people, processes, technology and governance.

08 **Project Mobilisation or Recovery**
Launch a priority or restore pace to a stalled project.

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FIRMS

Tailored business transformation

Mint Blue Consulting complements technology and specialist advisers by owning the firm-wide change needed to turn recommendations into operational reality.

LARGE FIRMS

Board ambition into business execution

- Translating your strategy into practical application
- Aligning leadership, teams and multiple suppliers
- Maintaining momentum while running the business
- Embedding consistent change across the group

MEDIUM FIRMS

Tailored business change

- Tailored project management support for your teams
- Turning requirements into action ‘The How’
- Organising internal ownership around suppliers
- Leading adoption while the team serves clients

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HOW WE WORK

From agreed direction to an embedded business outcome

The project is mobilised quickly, governed clearly and designed to leave the change embedded in the firm.

01

DIAGNOSE

Translate your strategy into clear business outcomes, readiness view and delivery priorities.

02

MOBILISE

Create the firm-wide plan, governance, ownership, resource model and success measures.

03

DELIVER & EMBED

Lead internal workstreams, supplier dependencies, decisions, adoption, benefits and handover.

A TYPICAL PROJECT CAN INCLUDE

- Fractional Transformation Director or Project Lead
- Cross-functional leadership across people, process and technology
- Benefits tracking and structured handover
- Weekly governance, decisions and action management
- Testing, pilot, training and adoption support
- Project structuring / restructuring

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DELIVERY

Mint Blue Consulting supporting supplier delivery

Independent customer-side leadership that connects the supplier plan to the firm's wider programme and desired outcomes.

SUPPLIER CORE AREAS

01 Implementation plan
Provides the product or service delivery plan and milestones

02 Configuration & development
Configures the solution and completes agreed development

03 Technical implementation
Manages technical activities, environments and deployment

04 Issue resolution
Investigates and resolves supplier-owned defects and dependencies

05 Training & support
Provides product training, documentation and ongoing support

Supplier delivery

BRIDGES THE GAP

Customer outcome

HOW MINT BLUE CONSULTING SUPPORTS

01 Aligns the wider customer programme
Connects wider strategy, scope, plans, tech stack, resources and governance

02 Customer & Supplier Partnership support
Focuses on the firm's requirements and outcomes while supporting the supplier

03 Co-ordinates delivery
Organises and facilitates internal teams, shared services and key suppliers

04 Drives readiness
Innovates testing, pilot, new roles, training, operational prep and communications

05 Maintains momentum
Challenges slippage, resolves blockers and reports to sponsors

OUTCOME | A coordinated, achievable project that delivers the supplier solution and embeds the change successfully within the customer firm.

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CLARITY & STRUCTURE

Project Consultancy

For firms that are not yet ready for full delivery, Mint Blue Consulting also provides focused consultancy to define the business model, clarify the technology landscape and turn priorities into realistic projects.

01

Propositions & Target Operating Models

Clarify first what should be centralised, standardised or retained locally, and align roles, processes, governance and technology for the future.

02

Technology Stack Reviews

Review systems, duplication, gaps, integrations and supplier dependencies against the operating model and future plans.

03

Project Structuring

Translate your ambitions into objectives, scope, workstreams, governance, resources, risks, milestones and a workable project plan.

04

Project Guidance & Assurance

Provide independent challenge, decision support, delivery reviews and practical guidance to strengthen the internal project team.

OUTPUT | A clearer direction, prioritised recommendations and a practical route into mobilisation and delivery.

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Case studies

The common thread is cross-functional mobilisation, governance, supplier alignment, adoption and measurable business outcomes.

BUSINESS-WIDE IMPLEMENTATION

New CRM implemented with a new industry integration build

MINT BLUE CONSULTING'S ROLE

Led the project rollout, oversaw the integration build and worked with the team to deliver new processes, rollout, testing, training and adoption.

OUTCOME

Integrated technology and a repeatable blueprint created for future implementations.

OPERATIONAL ACQUISITION INTEGRATION

Two businesses operationally merged within three months

MINT BLUE CONSULTING'S ROLE

Restructured the project scope and led the operational integration across HR, Finance, IT, Legal, people, processes and technology.

OUTCOME

People and technology operationally integrated to legal deadlines.

OPERATING MODEL CHANGE

Self-service onboarding redesigned for scale

MINT BLUE CONSULTING'S ROLE

Converted a convoluted backlog into a prioritized roadmap, established ownership and led a six-month cross-team pilot.

OUTCOME

Onboarding reduced from days to hours and administrative effort reduced by 90%.

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TRANFORMATION DELIVERY

Case studies

The common thread is cross-functional mobilisation, governance, supplier alignment, adoption and measurable business outcomes.

NEW PROPOSITION

Digital Advice Proposition

MINT BLUE CONSULTING'S ROLE

Implemented the new proposition with the selected suppliers, obtained Exec sign-off, process design, facilitated PowerApp and associated Platform development, organised the rollout, IT testing, Pilot and training approach.

OUTCOME

New digital proposition launched to time enabling a new tier of clients to be serviced in-house.

NEW PROPOSITION

Overseas office for a national firm

MINT BLUE CONSULTING'S ROLE

Managed the Target Operating Model implementation across international timelines involving HR, Recruitment, Finance, IT, Legal, people, processes and technology including the first onboarded client.

OUTCOME

New international office set up to expand the business.

NEW PROPOSITION

Firm looking to become an acquirer

MINT BLUE CONSULTING'S ROLE

Reviewed the Target Operating Model and Tech Stack followed by a workshop to review their acquisition plans and operational plans required to achieve that aim.

OUTCOME

A blueprint plan to align their own proposition and technology ahead of starting acquisitions.

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MINT BLUE CONSULTING

What could your firm deliver next?

Bring the strategy, recommendation or selected solution. Mint Blue Consulting can mobilise your firm, lead the joined-up delivery and embed the change.

DIAGNOSE • MOBILISE • DELIVER & EMBED

ABOUT US

Helen has nearly four decades of experience across wealth management, financial advice, fintech and consultancy, leading business transformation and change programmes since 2000.

In 2017, she founded Mint Blue Consulting, helping adviser firms, consolidators and financial services suppliers deliver operating model change, technology implementations, acquisitions, automation and business growth initiatives. Known for bringing together stakeholders to achieve successful outcomes, Helen is also an industry speaker, mentor and advocate and named ‘Woman of the Year – Fintech 2024’ in recognition of her industry support.

Helen Clark

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