


# Quantios

Sovereign Group  
removes borders  
to drive growth.

**SOVEREIGN**™





“We are heavily reliant on Quantios. It is our number one piece of software and it’s key for what we want to achieve as a business.”

Gerry Kelly  
CEO, Sovereign



### Industry

Corporate Services and Trust & Private Wealth Management.

### Size

600+ employees.

### Location

Headquartered in Gibraltar, with a presence in over 20 jurisdictions across Europe, Africa, the Middle East and Asia.

## Sovereign is a leading independent provider of corporate, private client, and retirement planning services.

Managing over 20,000 structures for companies, entrepreneurs, private investors, and high-net-worth individuals (HNWIs).

With assets under administration exceeding £20 billion and a history spanning several decades, Sovereign has continually adapted to meet the evolving demands of its international clientele. The largest challenge in that time? Being ready to evolve with changing client needs.

As the business grew, the senior leadership team became increasingly aware that it needed to consolidate the disparate systems across its offices, which were leading to inefficiencies, data discrepancies, increased operational complexity and challenges in maintaining compliance across different regulatory environments.

## Decades of Partnership: Evolving with Quantios

Sovereign's journey with Quantios, formerly known as Viewpoint, began 22 years ago when Sovereign adopted Quantios' basic company secretarial package. Since then, more than 10 new offices have been opened in jurisdictions such as Singapore, Guernsey and big expansion into the Middle East as well as dedicated operations for specialist sectors such as marine services. The business has grown to over 550 highly-qualified and experienced lawyers, accountants, pension technicians, administrators, managers and tax advisers across its global network of 21 offices.

**It now does business without borders.**

Over the years, Quantios has evolved to meet Sovereign's expanding needs. Sovereign and Quantios decided that a unified system would enhance operational efficiency and secure data management across global offices with an enterprise cloud solution. "Quantios was able to meet our needs for operational consistency, centralisation and efficiency, as well as enhancing regulatory compliance and improving data security," reflects Gerry Kelly, CEO of Sovereign.

# The new business as usual thanks to SaaS

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Easier team onboarding.

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Consistent client service.

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Reducing costs with less.

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Ready to operate in different jurisdictions.

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Less software maintenance needed meaning less disruption.

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Better service as standard.

## Overcoming Obstacles: The Path to Integration

The transition to Quantios' new SaaS-based platform presented cultural challenges. Employees accustomed to older systems initially resisted the change, and data needed to be migrated. A smooth transition was achieved across the board using phased roll-outs and careful data migration. A comprehensive training programme helped the team benefit from the new functionality as quickly as possible.

## Achieving Operational Excellence


The unified SaaS-based system under Quantios has streamlined many of Sovereign's backend operations, notably improving processes like invoice production and bank reconciliations. "These tasks, previously managed by multiple disparate systems, are now handled more efficiently, saving time and reducing errors," states Gerry.

Centralising data handling in Quantios has not only simplified compliance with international regulations but has also digitalised Sovereign's client services while significantly bolstering data security measures by providing robust protection against potential data breaches.

## Cost Control and Revenue Growth

The consolidation of systems has led to cost savings in maintenance and reduced the need for repeated training across different offices, further enhancing operational efficiency. The unified system has been instrumental in supporting Sovereign's growth strategy, particularly aiding in scaling operations and integrating acquisitions smoothly.

Centralising operations into one system has enabled Sovereign to manage client services more coherently, enabling faster and more accurate services across jurisdictions.



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Better service as standard.

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More collaboration.

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Future-ready.

### Future Vision: Enhancing Client Interaction and Service Delivery

Looking ahead, Sovereign plans to implement a client portal and further enhance workflow automation to improve client interaction and service delivery. These steps are part of a broader strategy to leverage Quantios to maintain a competitive edge and support its global operations, focusing on streamlined processes and enhanced efficiency.

Reflecting on the transformative impact of this long-term partnership, Gerry Kelly adds, “We are heavily reliant on Quantios. It is our number one piece of software, and it is key for us in terms of moving forward and what we want to achieve as a business.”

**The new business as usual is always evolving with client needs.**



# Quantios

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