

LINKTANK (PTY) LTD

About us

Via our 6 Step Technology Process © Linktank assists financial advisory practices in successful selection, implementation and ongoing maintenance and support of technology solutions aimed at efficiency and cost reduction. Underlying services, such as commission data administration, are also available as outsourced functions.

Value proposition

We understand that technology and operational automation are not core business focus areas for financial advisors. We're able to offer our collective experience and familiarity with industry software solutions in order to ease the pain of choosing, learning, implementing and maintaining systems that best suit a practice's unique needs.

Our experience spans multiple software products across the South African market.

Services offered

Business Consulting with regard to software and process automation:

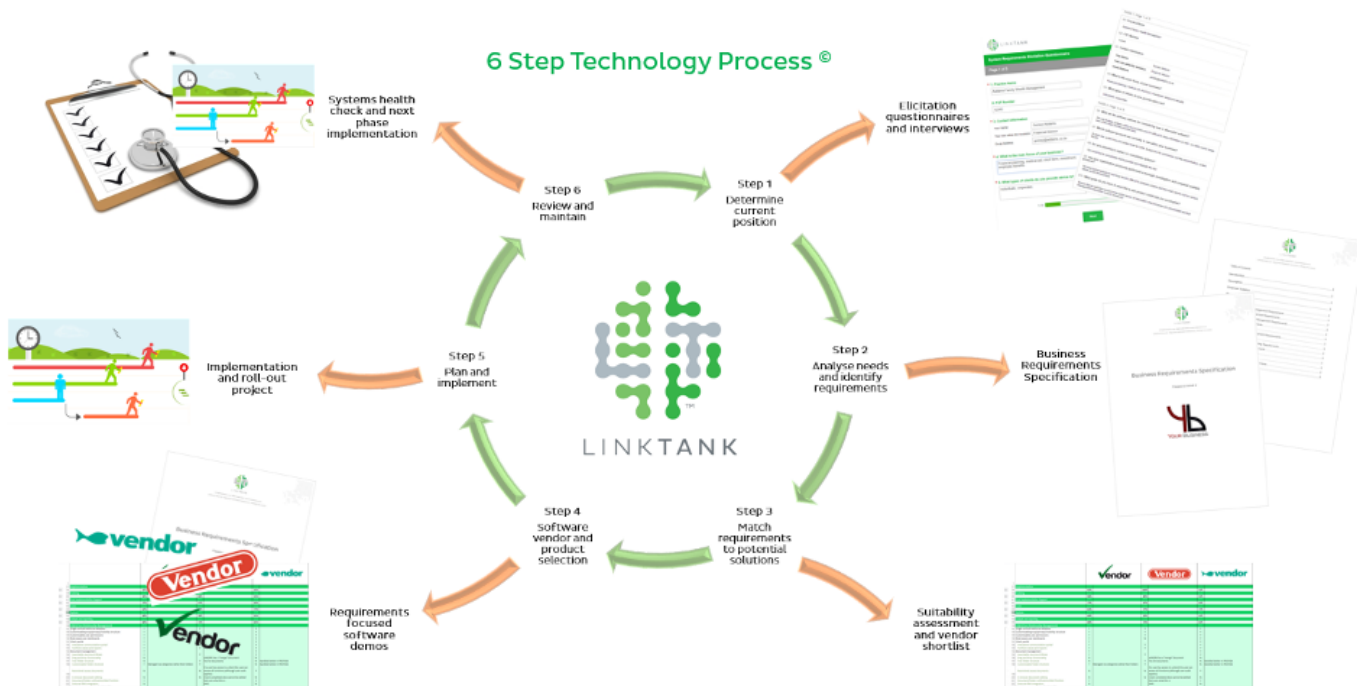
- System health check and gap identification
- Business requirements and vendor selection projects
- System implementation projects

Ongoing support and maintenance iro implemented systems:

- Outsourced system administration
- Testing services
- Ongoing end-user call centre support

Data administration services:

- Data integrity analyses, data consolidation and grooming
- Outsourced commission and fee data administration



Key individuals

Jen McKay, Nina Lowes & Robyn Clay

Contact persons

Jen McKay, Nina Lowes & Robyn Clay

Contact details

Tel (work): 087 807 8500

Tel (cell): 082 905 2953 (Jen McKay)

071 360 9914 (Nina Lowes)

084 500 1050 (Robyn Clay)

Email: info@linktank.co.za

Website: www.linktank.co.za

Regions supported

All of South Africa

Reference and pricing

In order to qualify for preferred rates, clients would simply need to confirm having a Financial Service Provider contract ("FSP contract") in place with AGIS.

Once qualified, clients will enjoy discounted rates of up to 20% on Linktank services. A sample of such discounted rates, as at 2021, may be summarised as follows:

Task	Linktank effort	Estimated cost	Required (Y/N)
Step 1: Determine current position			
Provision of elicitation survey for completion by advisor(s) and administration staff	0 hours	R0	
Consolidation of business requirements elicitation feedback	1 hour	R950	
		R950	
Step 2: Analyse needs and identify requirements			
Documentation of Business Requirements Specification	4 hours	R3 800	
Discussion of Business Requirements Specification and finalisation of document based on feedback	1 hour	R950	
		R4 750	
Step 3: Match requirements to potential solutions			
Mapping requirements against industry solutions, requirements submission to vendors and feedback where necessary	3 hours	R2 850	
Consolidation of suitability assessment and report back on vendor shortlist	2 hours	R1 900	
		R4 750	
Step 4: Software vendor and product selection			
Arrange system demonstrations with shortlisted vendors	0.5 hours	R475	
Participation in requirements-focused demonstrations	3 hours	R2 850	
Post-demonstration recommendation report	1 hour	R950	
		R4 275	
Step 5: Planning and implementation			
Development of project plan for implementation (in consultation with business and vendor/s)	2 hours	R1 900	
Data integrity assessment for migration	3 hours	R2 850	
Implementation project as defined by scope (to include data conversion, system configuration and setup, integration consultation etc)	Scope dependent	Scope dependent	
		TBC	
Step 6: Review and maintain			
Six month health check evaluation	2 hours	R1 900	
Ongoing implementation project	Scope dependent	Scope dependent	
End-user call centre support	Scope dependent	Scope dependent	
Outsourced System Administration	Scope dependent	Scope dependent	
User Acceptance Testing (UAT)	Scope dependent	Scope dependent	
		TBC	