

How Worldox + Virtuoso + other integrated add-ons = real-time service, more collaborative client meetings.



Challenge:

To integrate document handling with CRM-based meeting planning, moving towards paperless, more collaborative client meetings.

Solution:

Worldox installed, along with several helpful financial planning add-ons from Trumpet.

Result:

Client meetings are now presentation-based, paperless. Worldox and Virtuoso work together, so meeting prep is much faster, more efficient. Client requests can be handled on the spot.

“The image of our firm is enhanced by the use of Worldox and Virtuoso in client meetings”

By Michael Grossman

President, AdviceOne, LLC

I had heard about document management from a few local firms. Knowing that I wanted to go paperless, my partner invited Trumpet, Inc. to speak at our state Financial Planning Association. The subject was Worldox. As soon as the session started, it just all came together. They talked about the use of the product – what it could do for us - rather than just describing features. That really got my attention. Soon after, we were brainstorming with Trumpet, and using Worldox.

We needed a better way to manage client meetings.

With 50 to 60 client meetings each week, we were spending a huge amount of time updating and gathering documents, supplying requested files, doing follow-ups. One postponed meeting could waste hours of preparation, with the need to store and perhaps update files for re-presentation later. The workload was too much; I felt we were not serving our clients well with paper-based systems.

Solution: the Worldox/Virtuoso combination

Worldox integration with Virtuoso (connecting Worldox to our CRM system) is the key. We began using Trumpet's Virtuoso add-on for meeting planning, presentation and follow up. Worldox document-handling meshes transparently with Virtuoso, to the point where buttons in Virtuoso actually open Worldox work lists. So when advisors prepare for meetings, the whole process is streamlined. Everything they touch all day long is only one click away.

A streamlined, simpler process

Things are so different now. Document-handling is part of the meeting process, not separate from it. Advisors prepare, change, output and/or email documents on the fly. We've gone paperless in presenting information to clients during meetings too. Documents are presented on plasma screens. It's professional, a smooth way to maneuver documents live. The image of our firm is enhanced by the use of Worldox and Virtuoso in client meetings.

AdviceOne, LLC

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We can handle client requests on the spot with a few mouse-clicks. Everything is real-time. No time is wasted, even when meetings are postponed. There are no piles of paper to save. With Worldox, the amount of time saved in meeting preparation is almost inconceivable. Prior to Worldox, the man hours spent on meeting preparation - just the space needs spent on it - were staggering.

An unanticipated benefit

We bought a practice at another location recently. Because of this seamless Worldox and Virtuoso integration, we were able to cut the existing space in half and double the meeting room space at the same time. Now all of our work can be done through one central location, even though many clients are in another county. Those client meetings may be remote, but it’s as though the people who prepared the meetings are in the next room.

So my firm can grow and expand geographically, and yet never have to hire employees in new locations to do the work. What that’s done is allowed me to start marketing towards even more practice buy-outs.

An easy transition

Worldox is very intuitive. Our staff took to it quickly. Trumpet did the installation for us, customizing the filing system to the specific needs of our practice. They provided the training, and we took it from there.

The bottom line:

Thanks to how Worldox has enhanced our client meeting processes, we probably spend more face-time with our clients than any other firm in the country. Being able to work more collaboratively with clients, in real time, has greatly enhanced the level of service we can provide. Worldox helped us create a tightly-integrated back-end system, and that is very much to the benefit of our clients.