CURRENT SALES PROCESS

- Meet Client: Gather Information
- Create: Financial Plan
- Schedule: Follow Up Meeting
- Present: Financial Plan
- Organize: Signed Documents
- Implement: Financial Plan

NEW SALES CYCLE
WITH MY SERVICE

- Client visits website, fills out information themselves (eliminating meeting 1, goals are now defined)
- API integration with Money Guide Pro brings in data from salesforce API to aggregate all input data into financial plan
- First meeting happens, which covers goals of original meeting #2. 2 steps have already been eliminated (step 1 and step 2
- During this meeting, a plan has already been created in new step 2, which is now presented. Paperwork is signed/account opened.

BENEFITS
EFFICIENT SALES PROCESS

- Increased compliance (electronic records of client data created at every step, initiated by client)
- Reduced sales cycle time
- Reduced advisor workload (api integration automates: collecting data, creating plan, preparing for meeting, and document signature collection)
- More "hooks" you can elaborate on with research.
- Increased client account service, greater scalability. Advisor can now handle 3x more households due to increased efficiencies.

Advisor Systems