

*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

August 20, 2009

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

“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”

“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.”

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.

New ways to work smart:
*How Worldox and Trumpet changed
the deal for one Financial Services firm.*



By Angela Aboujaoude
Office Operations Manager, Lodestar

June 23, 2009

**Lodestar Personal
Asset Management**

Challenge:

*To implement a
Document Management
System with the widest
range of capability,
including direct scanning
and fully integrated
document relationships.*

Solution:

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

Result:

*Complete control,
centralized document
handling – a HUGE
increase in efficiency over
pre-Worldox operation.*

*“It turned out to be a
surprisingly easy
transition.”*

With the sheer number of documents we generate, receive and manage for our clients, the need for some sort of document management system had become obvious at Lodestar. The problem was, we didn't know much about available options, and had no idea which solution might be best for us.

A timely connection

I'd heard good things about Trumpet, Inc. They came highly recommended by colleagues at other financial services firms who had used them to help implement software for document handling and workflow improvements. That expertise was exactly what we needed, so I decided to give Trumpet a call.

They recommended Worldox for document management, and suggested several other financial planning applications and products (including *Virtuoso*, and *Assemblage*) that could be integrated with Worldox.

The pricing was reasonable. Even more important, it felt right. We could already see that the support and training we needed would be there. It was an easy decision to make.

A smooth, painless transition

Working with documents this way was a big change for our firm, but it turned out to be a surprisingly easy transition.

Trumpet took care of all installation and set-up, and also provided pretty extensive training and documentation for our users. They made it easy to get up and running. So much so, we've had no need for technical support directly from World Software. We had high expectations ... Trumpet did even better than we'd hoped.



Lodestar Personal Asset Management

“In a recent SEC audit ... we were able to respond to document requests almost instantly, thanks to Worldox marvelous search capabilities”

“I’m most impressed with the relationship between Trumpet and World Software. They work closely together, and that’s very much in our favor.”

The Worldox difference

It’s been a little over three years now since we started with Worldox. We use all the standard document management features - filing, searching, emailing documents. Everything is centralized, completely controlled.

BIG difference. The time saved compared to how we did things before is huge; the longer we use Worldox, the more efficient we get, and the more time we save. The training materials Trumpet gave us make bringing new employees on board simple and straight forward.

It turns out to be quite a space-saver too. With document control in place, we were able to consolidate storage and remove several large filing cabinets from the office.

I particularly like how Worldox lets you convert a document to PDF and save it in the same location. That’s *incredibly convenient*.

The moment of truth came in a recent SEC audit here at Lodestar. We were able to respond to the auditor’s document requests almost instantly, thanks to Worldox’ marvelous search capabilities. Our response time was so much faster than before. *It made everything easier.*

One more thing

I’m most impressed with the relationship between Trumpet and World Software. They work closely together, and that’s very much in our favor. All our requests are answered quickly and accurately.