

ENRIZEN AT A GLANCE

NO. OF EMPLOYEES

1 - 10 employees

MEASURABLE IMPACTS

- ✓ Improved efficiency of advice production and delivery.
- ✓ User friendly and adaptable templates to easily create documents.
- ✓ Flexible, intuitive system.

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FRANK DA LUZ

Director

THE CHALLENGE

Our previous software providers were good at selling us a dream but when it came to the execution the solution fell short. The bigger groups are not adaptive or flexible enough and their support took too long to fix small issues. The templates were hard work and it was an ongoing battle for my paraplanner just trying to deliver advice.

THE SOLUTION

Where Plutosoft really stood out was the immediate efficiencies and simplicity that it offers. The ability to manage clients, adapt templates and create documents - it all made sense to me.

The onboarding process is an excellent structure, compared to coming out of one of the bigger groups. We felt ahead of the ball game a lot quicker; they gave me what I needed to get moving which was great. We were in a much stronger position to deliver advice and we were off and running with templates within two weeks. What was presented to us in the sales process is exactly what is currently offered in the system. Everything we've asked of Plutosoft, they've delivered. You can feel that it's built by a financial planner - it understands what planners do and how they do it.

THE RESULT

The biggest improvements we have seen so far is around advice delivery. We are definitely getting our advice out a lot quicker, less editing, which is huge because there's a time saving there. I have a happier advice team. We are looking forward to rolling out the Client Hub - to be able to liaise with clients and get details updated is going to be a lot more efficient.