



CPB Financial Services
Relationships | Solutions | Support

CPB FINANCIAL SERVICES

CPB FINANCIAL SERVICES AT A GLANCE

NO. OF EMPLOYEES

1-10 employees

MEASURABLE IMPACTS

- ✓ The ability to change our templates has removed the need to outsource this, saving time and money.
- ✓ Streamlined processes has made a material difference to the capacity of advisers.
- ✓ Workflow management has provided a better perspective of client tasks and ensures nothing is missed.

“Plutosoft has streamlined our processes. Ongoing advice document preparation time is 30% quicker per client.”

KEIRAN MCPHEE
Director

THE CHALLENGE

Our previous software was clunky, slow and inefficient. Producing ongoing advice was difficult, time consuming and required double handling of data. The maintenance of templates was prohibitive and costly to make changes, hence we were forced to outsource this task to another provider - the turn-around time was affecting business.

THE SOLUTION

Changing to Plutosoft has revolutionised our business. We now have a fully integrated system that has helped us gain greater efficiency on advice production. The ability to change our templates has removed the need to outsource this, and we have seen a big saving on time and cost to produce advice.

Using workflow management has given us a better perspective of client tasks at a practice level. If a staff member goes on leave, tasks can easily be re-assigned therefore nothing is missed, and we feel more in control.

THE RESULT

Plutosoft has streamlined our processes and made a material difference to the capacity of our advisers. Ongoing advice document preparation time is 30% quicker per client, as a result our administration costs have reduced significantly.

