

TAP Financial Advisor Solution

TAP Financial Advisor

Solution...Independent Financial Advisor
Sales/CRM & Workflow Task Management
Solution including Financial System Data Integrations with QuickBooks, Lacerte Tax and Black Diamond Financial



team collaboration and data sharing across the country.



Customer Case Study...The Problem

A regional financial services company quickly realized their ability to grow their network of clients and advisors required integration amongst core business systems. Their current shared services systems that manage client and company data were disjointed, causing manual processes and management of separate spreadsheets that were not accessible to other advisors. Current practices limited company growth,

TAP Innovations' Solution...

TAP replaced 10+ Excel spreadsheets with workflow-friendly screens to capture data so more people can collaborate with access to necessary business information. The TAP Innovations enterprise solution allows the business and advisor functions to scale quickly, meeting time expectations of current and new customers. Information is now stored in a centralized database for quick access and updates, cross-country team collaboration and business intelligence reporting and analytics. The team can gain insight into regional and national trends, forecasts and company performance.

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The streamlined workflow and efficient data management practices became value-add services amongst competition that helps advisors expand their customer base and collaborate at a higher level with immediate access to enterprise information. Insert future video here.



In addition, TAP replaced 3 systems, 20+ spreadsheets, and 40+ hours per week across 50 people manually tracking tasks. Brought efficiency into data management practices to increase revenue potential by 50% and created new business insights with reporting and intelligence, allowing rapid company expansion that was not previously possible from a regional office to a national team of advisors that can support wealth management, tax, accounting, and investment advice for executives and businesses.

Key Digital Tools...

CRM/Sales/Product Mgmt – iSMS, Task, Reminder & Workflow Mgmt – TRN, Master Data Mgmt & Indexing – Admin, Business Intelligence/Reporting – myBI, , Intranet/Extranet on steroids – C3 & C2P

About TAP

TAP delivers cloud-based custom solutions to eliminate **Manual Efforts** and **Spreadsheets (MESS)**. TAP's Integrated Digital Toolbox™ automates manual processes and reduces spreadsheet sprawl, actions data into information and performs intelligent content organization across people and entity enterprises. A growing set of Digital Tools for CRM, Business Intelligence, Integrations, and more are web and mobile enabled and quick to fill data interoperability gaps with core business systems. TAP solutions have been implemented to streamline business processes for leading healthcare and financial management organizations as well as internal departments for companies from 50-15,000 employees and users. Visit www.tapinnov.com to learn more.

