ROSKOW INDEPENDENT ADVISORY

ROSKOW INDEPENDENT ADVISORY AT A GLANCE

NO. OF EMPLOYEES

11-20 employees

MEASURABLE IMPACTS

✓ Interactive modelling with clients and the ability to create multiple scenarios.

✓ Client hub allows for a more engaging client experience.

✓ An efficient workflow management tool – we are more organised, feel in control and appear more professional to our clients.

"Interactive modelling has been the real difference to our business – it is such a powerful exercise when done with our clients."

TOM BARLOW
Director

THE CHALLENGE

Our old system was slow, cumbersome, and mainly used as a CRM tool. The modelling capabilities were inefficient, so we used Excel to model outcomes for clients. We soon reached the point where Excel couldn't model what we wanted, and we knew we needed to find a solution. We looked for a system that would allow us to model effectively and provide us with a robust CRM solution to manage the business.

THE SOLUTION

The modelling capabilities in Plutosoft were what drew us to the platform. We love the ability to model interactively with clients and create multiple different scenarios to decide which is the better outcome for the client. We publish these to the client hub which provides a much more engaging client experience.

The onboarding process was instrumental in getting us up to speed on a new system in a relatively short period of time. The process was structured, clear and well executed. We felt we were well prepared to set ourselves up for success. Plutosoft walked the talk - they didn't fail to deliver on what was promised in the sales process.

THE RESULT

Our primary focus was modelling which we nailed early on. The interactive modelling is a real game changer. Efficiently managing workload was another focus area, we dedicated time at the beginning to ensure our processes set us up for success and allowed us to scale. This has resulted in us feeling more organised, confident nothing is missed and we look more professional to our clients.

PLUTOSOFT