

## Sci-Fi CRM

*Instead of just working on the road with a mere computer, connect with your client database with a smartphone.*

At the 2009 T-3 Conference, both Dave Drucker and Joel Bruckenstein predicted that within five to seven years, maybe sooner, advisory firms will increasingly rely on smart phone technology and handheld devices as they work with clients. The conference offered an interesting presentation that had a science fiction feel to it; we watched a speaker pull out information from various databases in his office and configure them on his iPhone, Google Phone and various other smartphone devices. Imagine being able to pull up a client's net worth, portfolio, tax or other relevant information while the two of you are having lunch, or, in the exhibit hall of a conference, schedule tasks for your employees as you encounter new ideas or new information.

These pleasant fantasies appeared to be dashed when, late in the session, somebody stood up and asked the killer question: is anybody in the planning space offering these capabilities? At the time, the answer was no.

Now we have a different answer.

"Basically, we're introducing a way for people to get 80% of the capabilities of the Junxure CRM program on any phone that has a browser," says Ken Golding, Junxure's chief technology officer. Junxure Mobile, as it's called, is one

of the enhancements in Version 7.0, which also introduces (yawn) direct integration between the program and Outlook to allow mailmerge and archiving of client messages linked to client files. The new version offers a required minimum distribution alert system and the ability to set up tasks that make sure this chore doesn't slip through the cracks, and an unlimited number of (yawn) action templates for office management. Version 7 also offers a new interface with QuickBooks so users can (stretch, yawn) track their business metrics on a dashboard; users now have the ability to customize the client information that shows up on your screen when clients call in asking for an update or advice, and if you happen to be an early adopter user of Microsoft's SharePoint program, you might get excited about the new integration capabilities.

But you really start living in the sci-fi world when you open up your phone, enter the Web and log into Junxure, which, according to the demo I received, takes you immediately to your alerts--tasks that have been assigned to you, or things that you want to remember to do.

While you're there, you can assign tasks to your office staff, or you can go ahead and search for clients using the same tool you use when logged onto Junxure at

the office. "You can view all their history, edit any history, you can create a new action for that contact--or, if you've talked with somebody who might be a prospect, who wants to get your newsletter, you could add a new contact," Golding explains. "You can see everyone in a certain classification of client, or get a list of all your clients, or all your employees, or all your ex-employees, or anything that you might search for in Junxure in your office."

You can also do these things by computer if you happen to be sitting in a hotel room somewhere--which, Golding says, addresses the persistent complaint that advisors can't use Junxure on any computer on the road, the way you can with Redtail. (Of course, they could do it if they have remote-desktop software or a mirror program that ties into their office computer.) The Junxure Mobile service becomes especially powerful if you also use ClientView, a standalone program that Junxure offers which creates individualized client web sites, with performance and other reports and key documents.

"Then you can go in and review all the reports that have been set up for that client, and check the documents while you're on the road, maybe face-to-face with the client over lunch," says Golding. "After lunch, you might want to schedule a task or make sure something gets done for that particular client."

Are there security issues here? "None of this information stays in our data center when you call it up," says Golding. "And it's all encrypted going through."

If Junxure Mobile only offers

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80% of what the program will do when you sit down behind your computer in the office, what is the 20% that it can't do? "You can't run a lot of the reports that are on the back end," says Golding. "And if I'm on the desktop version, I can add new templates. So I can say, maybe a client service phone call or an account transfer sequence needs to be created for the office. We don't allow you to do that on the web site. You can only use what has already been set up. I can use any of the templates that I want, but I can't set them up from the Web; I have to set them up from my office. Same thing with the lists. If you want to add classifications or keywords to the drop-down lists, you can't do that from the web. When you're on the road, you can only use the ones that have already been developed."

Golding was too polite to say that he doesn't expect old people like the person interviewing him to get really excited about tapping into the home office database with a Google Phone or iPhone--yet. But he does think that younger advisors who are more accustomed to browsing the web at lunch or on the road will quickly pick up the habit of organizing their business life on the fly. "Some people I've talked to are pretty excited; they can't wait to start using it," says Golding.

And, as usually happens, when the doddering old Baby Boomers finally manage to notice this extra productivity, and attend three or four more conferences where mobile technology is gradually demystified, they'll crawl suspiciously out of the stone age and start fulfilling the Drucker/Bruckenstein prediction. ■