

EXCLUSIVE: Laserfiche Integrates With Junxure CRM

Interface is latest success of Your Silver Bullet grass-roots effort

By [James J. Green](#)

October 25, 2007

Laserfiche, the electronic document management technology company, and CRM Software, the maker of the Junxure CRM software, announced October 25 they have integrated their two applications, providing a means of improved efficiency to advisors by giving users of Junxure one-click access to Laserfiche documents.

The integration is the latest and perhaps highest-profile achievement of Your Silver Bullet, a consortium of software companies that is working together to build bridges for advisors between software as disparate as CRM, financial planning, and portfolio management and reporting applications.

Greg Friedman, an advisor and a principal of CRM Software, says the intent of Your Silver Bullet, which he co-founded, is to “create, develop, and facilitate interfaces between different applications, all with an eye toward helping an advisor build his own ‘Silver Bullet,’ choose the different applications that he wants to use to run his office, and then have those applications work together.” In addition, Friedman hopes to make Your Silver Bullet a clearinghouse for advisors where they can evaluate applications for use in their practices. For instance, he says, if an advisor is looking at buying a new CRM package, “and I already use XYZ for financial planning, and I like it and don’t want to get rid of it,” he can see through Your Silver Bullet which CRM packages integrate with that planning software.

When an advisor looks at a company that’s joined Silver Bullet, Friedman says the advisor knows that company has provided “a stated, public commitment to open architecture, and that they either have or are looking to develop or working on developing interfaces between different applications to facilitate an advisor’s life, to make their workload much easier to deal with.”

There’s a third leg to the Your Silver Bullet membership stool: commitment to independent advisors, and not just as a potential buyer of their software. “They had to be good, supportive members of the financial advisor community, by supporting organizations like the FPA,” Friedman says as an example of Your Silver Bullet’s membership criteria. “There are ways to demonstrate that—we lovingly use the term ‘play well’—and Laserfiche is a good example—look at all the different things they

support in the financial planning community. That's an integral piece to the companies that join us.”

Long-time industry expert Tim Welsh of Nexus Strategy, who consults to Laserfiche, points out that for advisors, “technology is the backbone of their offices, and this is one way for all of us to move the entire industry forward—by streamlining these technology applications, making it easier for advisors to be more efficient and grow their businesses.”

Laserfiche will be demonstrating the integration at the Schwab Impact conference in Las Vegas from October 28-31. A list of participating vendors in Your Silver Bullet is available at www.yoursilverbullet.net.

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