

PARTNER SUCCESS STORY:

Time4Advice

Improved Workflow and Eliminated Manual Processes Through Enavate Partnership

Time4Advice was founded more than a decade ago on the idea that intelligent technology should enable financial and wealth managers to become their clients' trusted advisors. They chose the Microsoft Dynamics 365 Customer Relationship Management (CRM) module to build their customized software application upon. In 2020, Enavate helped Time4Advice design, rebuild and deploy the modernized CURO product on the Microsoft Power Platform.

Technology is a Time Saver for Financial Advisors

Ten years ago, finding a platform designed for this research-intensive, compliance-laden field was incredibly difficult. Financial consultants back then relied on out-of-the-

box tools that weren't designed to capture all their activities on behalf of clients. Manual processes left these professionals feeling like there was never enough time to truly meet the needs of their clients. But a new company realized the potential for technology to solve these problems. Mitchell Philpott, Director of Time4Advice, stated, *"We realized what matters is the human connections, and technology is just part of the machinery that supports that."*

Solving the time crunch wealth managers felt was the impetus for developing a customized software product, CURO, a platform to support the entire sales and service cycle for financial planning and wealth management businesses. The customized tool was built within the Microsoft Dynamics architecture to support all



Enavate's Partner: Time4Advice



PRODUCTS AND SERVICES:

Microsoft Dynamics 365 CRM
Microsoft Power Platform

INDUSTRY:

Financial Investment and Planning

ORGANIZATION SIZE:

Under 100

COUNTRY:

U.K.



customer interactions, from the first contact with prospects, sales and onboarding, and the advice shared between the financial planning expert and their clients. CURO helps financial advisers and wealth managers unify their data, processes, and business applications, as well as integrates with their everyday Microsoft 365 apps, including Excel, Word and Outlook.

The tool was wildly successful, and Time4Advice grew its client base and firm over the ensuing decade. CURO is tailored for the UK market's highly regulated financial planning industry. The platform ensures that financial regulators' interactions with clients are fully recorded, and the data they collect is secure.

This is critical due to the sensitive information the industry collects, as well as the level of personal and business details captured by financial advisors.

CURO Needed to Modernize – And Needed a Partner

Today, financial advisors and wealth managers are turning more frequently to software to help create a holistic, efficient service that adds value to clients.

By 2020, the on-premises solutions offered by CURO needed to catch up with the rapid

change in the wealth management industry. The leadership at Time4Advice knew the Microsoft Power Platform and real-time Cloud architectures offered exciting features to improve the CURO product. But they needed to figure out where to start the process of reinventing their platform onto the new Microsoft Power Platform.

They turned to Microsoft, who recommended their Gold Partner, Enavate.

Enavate and Time4Advice modernized CURO's architectures, building a new software platform on the Microsoft Cloud infrastructure. Enavate's ability to provide complex solutions based on a modern technology stack with their productive engineering team was the key factor of their successful collaboration.



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Guiding and Deploying a Cloud-Ready CURO Product

Enavate provided a complete lifecycle strategy, development and implementation processes for modernizing the CURO code onto the Microsoft Power Platform. The process required a software team competent across Dynamics 365 Sales and the entire Power Platform suite, and who could improve the tools and optimize the migration to the new architecture. Enavate supported and guided the rebuilding and redeployment of the new and improved CURO.

Enavate collaborated with Time4Advice to build a modernized CURO product to deliver new features on the new architecture. This effort included:

- Technical Strategy Support
- Business Analysis
- Data Migration
- Development
- Project Management
- Training

The team knew Time4Advice wanted to continue to leverage Microsoft's excellent services for the product refresh. Alan Sherriff, Program Manager, says, *"Microsoft Dynamics*

has been a differentiator for us in the market since we launched. None of our direct competitors use the tool. We benefit greatly from the underlying investment Microsoft makes each year to improve the platform."

At the same time, the firm was intrigued by the unique new features of the Microsoft Power Platform. Alan points out that the beauty of CURO has always been that it allows financial planners to customize the software without *"having to employ armies of developers or pay*

expensive outsourcing companies. There are tools on the Power platform which allow them to extend CURO exactly to fit their business."

Alan is referring to the intuitive artificial intelligence (AI) automation, and the low code/no code approach to Microsoft Power Platform that allows end-users to simply drag and drop features for easy customization. It's an intelligent way to put the power of CURO CRM directly into the hands of financial planners.





Partnering with a U.S. Offshore Team

The modernized CURO launched one year after the project's inception, which was an essential milestone for Time4Advice. Behind the scenes, the Enavate development team collaborated remotely with Time4Advice developers to build and deploy the new product.

Alan describes the labor-intensive partnership between the two teams, *"We met twice a week. We had technical meetings with the developer and project management teams. Emails flowed back and forth with ideas, requirements, bug investigations, demos, and other monthly project management matters. We did everything that you might do within a product team with Enavate. So, they were effectively an extension of our development team in the U.K."*

Key to this partnership is the responsiveness of the Enavate team and their ongoing commitment to the relationship. This was particularly remarkable as the partnership continued through March of 2022 when Russia invaded Ukraine, where the team working with Time4Advice was located. Despite living in a literal war zone, Enavate's work and dedication to the project was not disrupted.



"What stands out for me is that Enavate always responds. They always work as quickly and pragmatically as they possibly can. They keep going, they have good humor, and nothing's ever a problem when it comes to us. There's nothing that I've been involved with where Enavate said, 'No, we can't.' They simply say, 'Yes.' This strengthened our working relationship."



Alan Sheriff

Program Manager, Time4Advice



Partnership Includes Education – Not Just Technology Support

With Enavate, partnership is not just a delivery of a product. Enavate wants to see their partners succeed and they know that that involves more than just an amazing product. It also includes teaching and training.

Enavate built proof-of-concepts for our developers to learn from to better understand and work with the code. Now that CURO in the Cloud is live, Enavate delivers training to Time4Advice support, implementation and training teams. This training ranges from the basics of what the Power Platform is, and its benefits to very technical training for people who want to work and build within the solution.

In addition to building knowledge within the Time4Advice team, Enavate has also delivered training to Time4Advice clients and potential clients. As with any industry, implementing new technology can make businesses hesitate when it comes to deployment, but as Alan points out, *“For us to be able to say, we are partnered with the Microsoft Gold partner who has access to expertise across the business in this very technology. That gives our customers confidence that we have people there who’ve got our backs if we need it.”*





Future State of the Enavate/Time4Advice Partnership

The relationship with Enavate continues as the partnership between the two firms deepens. When Time4Advice runs across a client with a particularly challenging software integration or another extension, they feel completely comfortable outsourcing that project to Enavate. Outsourcing to a trusted partner frees up their internal developers to continue to build out the company's core products.

The engagement surpassed the two-year mark, and the Time4Advice team couldn't be more pleased with the work. In 2021, Time4Advice and the CURO product were purchased by Integraftin, a multi-award-winning investment platform. It's an exciting time and the future looks bright for Time4Advice, and Alan says, "Enavate allows us to continue to flex our capacity."

"Enavate has done the heavy data lifting under our guidance and has kept all our clients' sensitive data moved safely, securely and accurately. They've built tools that will allow us to import all that data into CURO. We now consider Enavate an extension of our business. They provide the IT extras we need to deliver within our ecosystem."



Alan Sheriff

Program Manager, Time4Advice

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