# Precise FP

## Connected Intelligence:

# Transforming Advisory Workflows with PreciseFP + Zocks

**How data integration and conversation intelligence unite to create smarter, scalable client experiences.**

# A New Era of Advisory Firm Intelligence

This isn't your parents' financial advisory business. Clients today expect personalized service, proactive planning and quick answers. Meeting these expectations requires more than mere competence. To maintain their position in the market, practice leaders need access to real-time data that's accurate, complete and actionable. This will only be more imperative going forward, as the number of people working with an advisor could reach as high 71 million by 2034.[1]

> **❝ Today's advisors need connected, actionable data to serve clients better and scale with confidence.**

Yet, the number of digital tools entering the mix has introduced a degree of complexity. It's common for teams to toggle between multiple disparate systems throughout the workday: client relationship management (CRM) platforms, data collection apps, planning software, document management solutions, communication channels and compliance tools.

In a perfect world, this "tech stack" should empower advisors and simplify operations. However, without effective integration, users often contend with more friction and less clarity.

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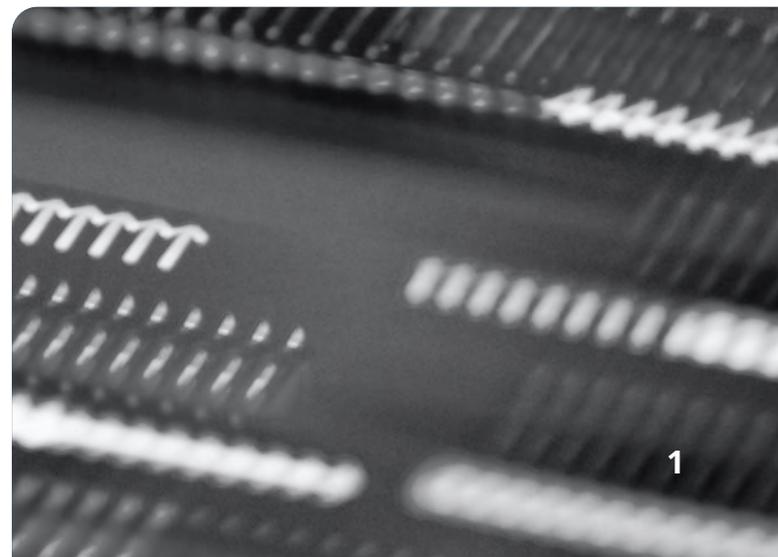
# The Connection Factor

Consider the typical client onboarding journey as an example of the technology problem.

Data comes from multiple sources. It's not unusual for advisors to collect relevant information via an intake form on a website, transmit scheduling links via email, gather supplementary details over the phone and complete a risk tolerance assessment during a meeting.
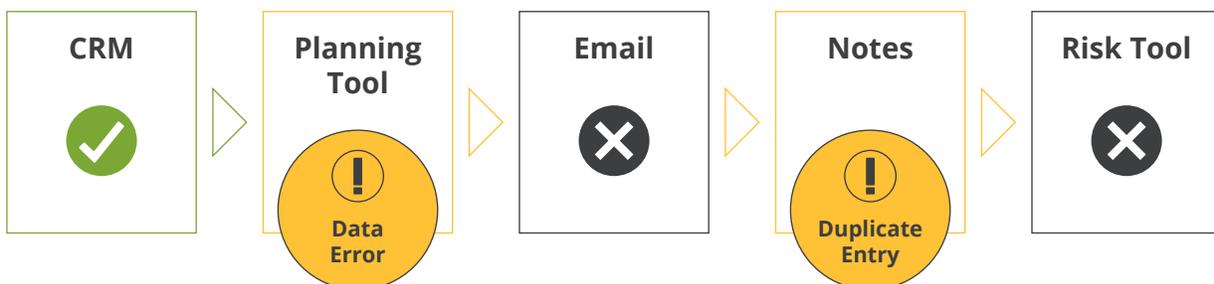
In each of these interactions, important data is collected. But depending on how the data was handled, it may not actually end up connected.

There are consequences if customer information gets trapped in different silos. For instance:

- **Onboarding takes longer and there are more errors along the way**

- **Advisors spin their wheels gathering missing data or key information they don't realize they already have**

- **Clients are asked to answer the same questions more than once, creating friction and poor client experience**

Disconnected systems can stymie insight, too. Without a big-picture, up-to-date view at the ready, advisors might fall short in their obligations to look after the client's best interest.

## What Happens in a Disconnected Tech Stack

| CRM | Planning Tool | Email | Notes | Risk Tool |
|-----|-----|-----|-----|-----|
| ✓ | ! Data Error | ✕ | ! Duplicate Entry | ✕ |

# The High Cost of Data Fragmentation

Despite a growing number of sophisticated platforms, most advisory firms are still left with the frustration that comes from fragmented data. Beneath the surface, advisors struggle with daily realities like:

❌ **Data is captured and stored across disconnected systems.** CRM tools, planning programs, financial document automations, e-signature tools and client communication platforms each contain critical data.

❌ **Manual rekeying persists.** Without effective integrations, advisors and back office staff have to pick up the slack and manually enter client details across their ecosystem. This eats into valuable time and can mean more errors.

❌ **Inefficiency becomes the norm.** From redundant tasks to unclear responsibilities, disjointed systems make it harder to scale best practices and maintain a frictionless client experience.

❌ **There is no single source of truth.** With each tool operating independently, advisors lack a 360-degree view of clients and their investments. As a result, they have to rely on anecdotes, instincts or incomplete information to inform next steps.

**" Firms fall behind not from lack of effort, but from systems that won't talk to each other.**

In addition, data fragmentation causes challenges like:

### ❌ The Paradox of Insight

Advisors can be sitting on a mountain of information yet still lack clarity. When the data doesn't come together into a cohesive picture, it's not easy for them to see the story behind the numbers. The result? Hesitation, second-guessing or missed opportunities that should have been obvious.

### ❌ Analysis Paralysis

Even when the right data is available, its sheer volume and poor organization can overwhelm the decision-making process. Advisors may spend more time piecing together reports and dashboards than serving clients. For example, preparing for a single review meeting can mean juggling five different systems. That's time that could have been spent deepening the client relationship.

### ❌ Data Fatigue

On both the client and advisory teams' ends, persistent requests for information or repetitive manual data entry create environments rife for frustration and disengagement. In the worst-case scenario, significant updates can be buried under "digital clutter." In this case, advisors face greater risks related to compliance issues.

### ❌ Integration Overload

More integrations don't guarantee that workflows improve. If connections are insufficient, integration overload can get in the way. This happens when the tech stack is large and cumbersome. The consequences can include tech support bottlenecks, higher costs and diminishing returns. True integration that works well will lead to tighter workflows.

### ❌ Tool Sprawl

Having every department or team member using their own preferred apps is a recipe for inefficiency. In tech-bloated environments, no one is really clear on what's being used or why. This makes training, process documentation and compliance a tall order. A tech stack should work like a piggy bank where everyone adds their two cents in one place to build a wealth of information.

### ❌ Digital Noise

Every app promises to help, but too many used together can create a constant buzz of notifications, reminders and alerts. Instead of sharpening focus, the clutter makes it harder to spot what's urgent or meaningful. Important client signals get buried beneath digital chatter.

All of these distractions add up. Instead of engaging clients and growing the practice, advisors are chasing information, rekeying data and fighting with fragmented workflows. When you scale this, firms fall behind the competition, face increased compliance risks and lose client trust.

# A Better Way Forward

Advisory firms need more than incremental change to right the ship. They need a strategic approach to data integration and workflow intelligence.

Enter: PreciseFP and Zocks.

Used together, these solutions bring a refreshing ease of intelligence and integration to advisor workflows. PreciseFP automates data collection, scrubbing and delivery while Zocks brings conversation intelligence into the fold. Advisors can rest easier with the complete context and nuance of every meeting captured and distilled into accessible, actionable insights.

Relying on both tools means advisors no longer have to wrestle with what can feel like competing interests: wrangling data while offering better advice, faster and at greater scale.

| Precise **FP** | **z** zocks |
|---|---|
| Data Collection<br>Integration Hub<br>Compliance Tools | Meeting Summaries<br>Insight Extraction<br>Action Triggers |

**" Together, PreciseFP and Zocks transform raw data and real conversations into client-ready workflows.**

# Bridging the Data Integration Gap with PreciseFP

Imagine a digital platform designed specifically to address the weakest links between the tools in your tech stack. That's PreciseFP.

Here's how it works:

**1 Integration Beyond Data Connection**
Unlike basic integrations that merely import or export data, PreciseFP goes deeper. It allows for the automation of complex, multi-step workflows, integrating with hundreds of data fields across industry-leading CRMs, planning software, compliance tools and more.

That means once data is collected, it moves wherever it's needed without intervention. Using PreciseFP as the primary entry point for client data eliminates repetitive, error-prone manual rekeying. It also speeds up workflows, since PreciseFP pre-populates forms based on existing records and updates every connected tool when new data is received.

Altogether, this accelerates all workflows that involve data by connecting digital data collection, data syncing, risk assessments and compliance necessities, into a single flow.

## ② Fewer NIGOs

PreciseFP's baked-in customization allows firms to modify forms and workflows to ensure only in-good-order (IGO) data makes it into the workflow. No more chasing signatures or closing the loop on missing fields. With PreciseFP powering their daily operations, advisors spend less time chasing paperwork and more time building important relationships.

## ③ Cleaner, Better Data

Poor data quality is often the silent kiss of death. PreciseFP's validation and enrichment features set the standard for accurate, up-to-date and compliant data. Clean data isn't just convenient. It reduces downstream errors that can impact analytics and reporting.
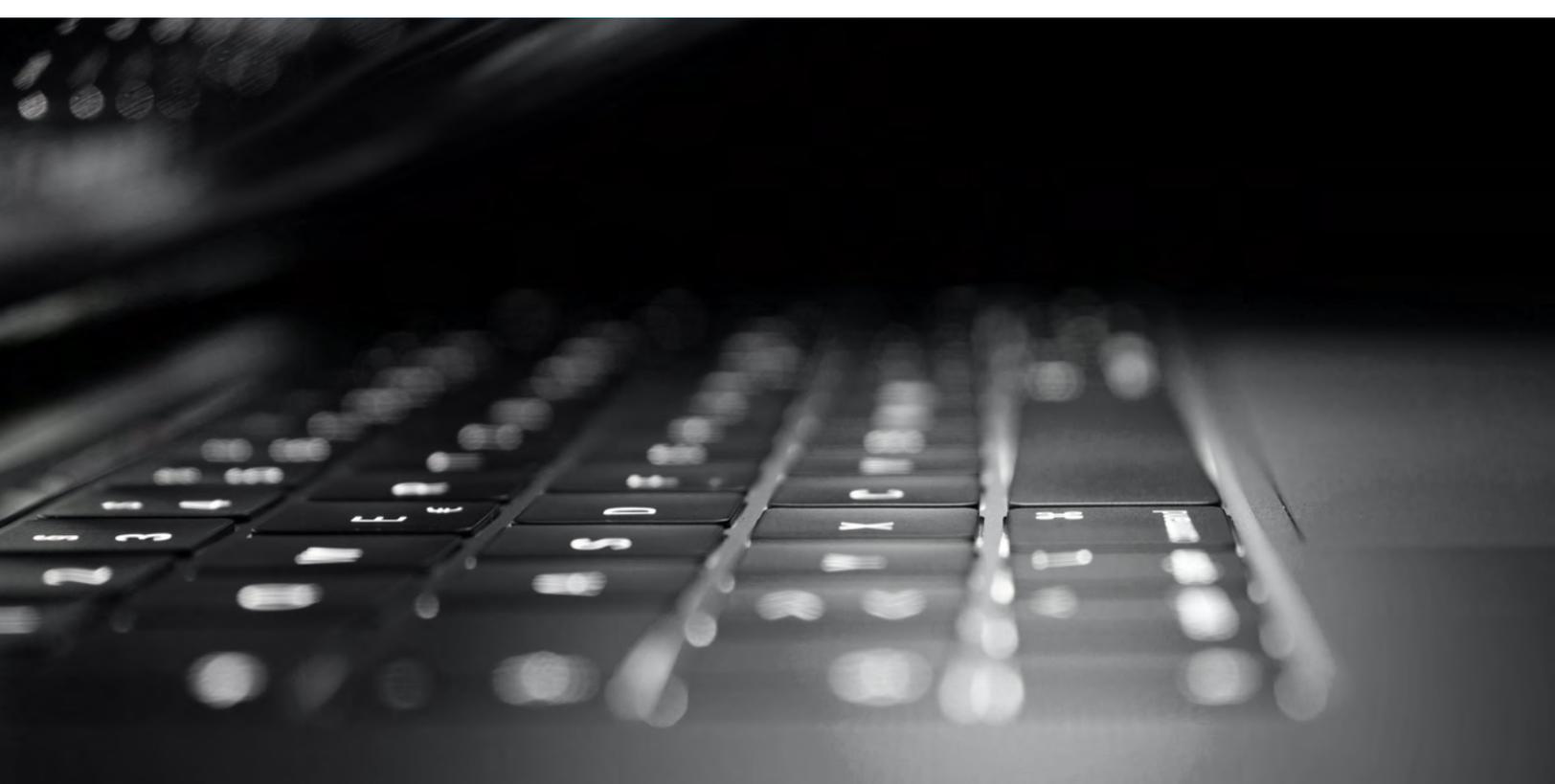


**Precise FP**

# Using Zocks to Get More from Meetings

Just as PreciseFP automates and enriches structured data, Zocks uses AI to turn conversations (unstructured data) into structured data, which can then be synced with PreciseFP and integrated into advisor workflows.

With Zocks, you can be fully engaged in the conversation and not worry about capturing every detail and nugget of insight about:

- **The client's priorities and concerns**

- **The life events shaping their future plans**

- **Where they feel confident**

- **Where they need more guidance**

Zocks documents and summarizes these findings in every meeting. And because the tool aggregates the information from all your connected sources, even the most casual conversation can be translated into actionable data that your team can access and act upon. With Zocks, there's no need to jot down notes or struggle to recall discussion points after any encounter.

Use it to auto generate meeting summaries, capture detailed household and financial facts, identify key themes, tasks and follow-ups. Nothing slips through the cracks, and all team members work together from the same shared understanding about the client.

Zock also analyzes discussion patterns across multiple client interactions, so you can:

- **Identify opportunities (to upsell, cross-sell or provide timely advice)**

- **Pinpoint emerging risks (like shifts in risk tolerance and sudden life changes)**

- **Facilitate consistent, compliant messaging across the organization**

Zocks empowers teams to turn conversations into a structured, relevant knowledge base so that nothing is left to chance.

**When used alone, PreciseFP and Zocks each bring simplicity and ease to everyday challenges. Together, they unlock great potential, marrying powerful data integration with deep conversational intelligence.**

**Here are a few of the high points:**

○ **All client data (factual, subjective, contextual) is captured, connected and made actionable**

○ **Advisors always have up-to-date client records with the relevant information they need to confidently make recommendations**

○ **Every workflow, from onboarding to annual reviews, is turnkey and personalized**

**Advisors get the benefit of a solution that reflects efficiency, insight, trust and, most importantly, customization.**

# The Integration Factor

Advisory firms that embrace the magic behind PreciseFP and Zocks report dramatic improvements across core metrics. They're seeing:

## Up-to-Date Data

Centralizing information flow means every client detail is accounted for, accessible and usable, no matter where or when. Advisors spend less time searching and more time on activities that yield sustainable results.

## Faster Planning

Transmitting high-quality data at high speed matters. Both PreciseFP and Zocks enable advisors to move quickly from information gathering to activities like drafting financial plans.

## Seamless Communication

Conveniences like automated pre-meeting briefs and post-meeting recaps and reminders mean clients benefit from consistent, professional communication. They never have to repeat themselves and they always feel invested.

## Premier Client Service

Clients receive a level of attention and care that positions them as the firm of choice. Everyone benefits from more productive meetings and anticipated needs.

## Elimination of Duplicate Entry

Automated, two-way integrations mean data changes are instantly reflected everywhere. This dramatically reduces admin overload, decreases error rates and lets staff reclaim hours.

For example, if a client updates their home address during a review meeting, Zocks automatically captures the change. PreciseFP updates the CRM and all downstream documents with no extra busy work required.

## Error Reduction

Redundant data entry and disparate systems are the biggest contributors to data errors. This can be a disaster for businesses with tight compliance requirements. With PreciseFP and Zocks working in the background, every update is captured once and represented consistently across your ecosystem.

## Enhanced Collaboration

Action items are automatically assigned and tracked so that all stakeholders are aligned and accountable.

## Operational Efficiency

Less distracted by tedious tasks, staff can focus on high-value work like building relationships, solving nuanced problems and growing a client base.

**Want to see this integration in action?**

**We hosted a live webinar walking through the PreciseFP + Zocks integration, featuring a real advisor use case to simplify onboarding, planning and follow-up.**

▶ **Watch the Recording**

## Use Case: A Day in the Life with PreciseFP + Zocks

Meet Tom Smith, a principal advisor at a forward-thinking RIA.

Tom believes that the key to client trust and business growth lies in the small details. Like moments when an advisor recalls a prior conversation, follows up on a concern or delivers a relevant recommendation at a strategic time.

This is what his life looks like using PreciseFP and Zocks.

## Morning: Preparation

Tom starts his day with a dashboard auto populated by Zocks. Upon review, he sees key action items from yesterday's client meetings. The summary includes:

- **Meeting recaps with priorities called out**
- **Follow-up questions to ask each client**
- **Notes on life events or shifts in risk tolerance**

Previously, Tom would have needed to sift through emails, handwritten notes and CRM tasks to come to the same conclusions. Now, his "morning review" is automated, actionable and comprehensive.

## Midday: Client Onboarding

A new client, referred by an existing happy client, schedules an introductory meeting. PreciseFP has already supplied Tom with the basic information via a digital intake form. During the meeting, Tom asks about family goals, career changes and retirement plans. Acting as an assistant, Zocks adds the incoming information to the client's record in real time.

After the meeting, PreciseFP updates every platform in Tom's stack with the data Zocks gathered. The enriched data is distributed across the workflow, including to Tom's planning tools, CRM, billing software and compliance logs. The entire onboarding process only takes seconds when it used to take days.

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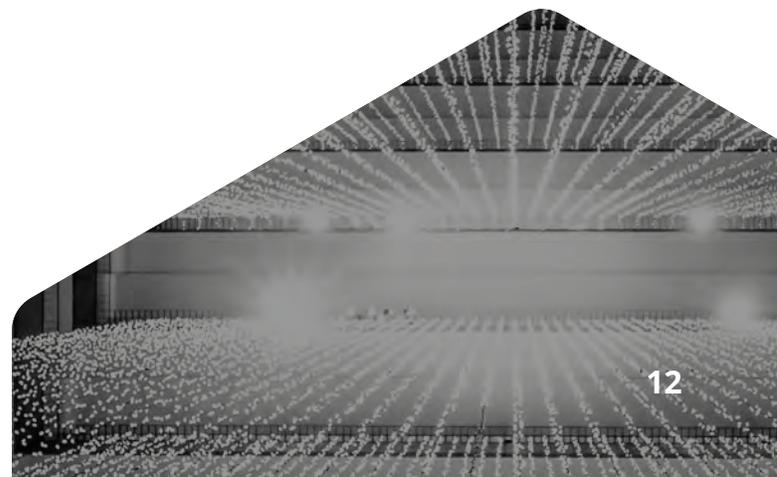
## Afternoon:
## Plan Implementation and Follow-Up

As Tom combs through his client roster, he references "client insights." These are summaries generated by Zocks based on ongoing interactions. Each one captures what matters most to the client, next steps and any outstanding requests. No tasks fall through the cracks, and each client feels like they're getting his full attention.

> **❞ What used to take days now happens in minutes.**

## End of Day:
## Review and Compliance

Before ending his day, Tom can see a data quality score generated by PreciseFP. In the event of a concern, Tom's team can trace every decision and communication with full confidence and the documentation to back it up. This work matters. In 2024, there was a stark increase in reported disciplinary issues related to compliance.[2]

## The Takeaway

When PreciseFP and Zocks act in tandem, Tom and his team feel more confident, prepared and supported in their goal to deliver a first-class client experience.

| Morning: | Midday: | Afternoon: | End of Day: |
|---|---|---|---|
| **Zocks-generated meeting brief** | **PreciseFP form completes onboarding** | **Insights summarize status** | **Data score + compliance snapshot** |
| **10am** | **12pm** | **2pm** | **4pm** |

# Why the Right Tools Matter

A cohesive, integrated tech stack is more than a practical consideration. It underpins a firm's strategy and future growth.

**① Integration Is a Strategy, Not a Checkbox**

The idea of "bolting on" more tools is prevalent but misguided, especially as software vendors seem to think that solutions with more features are always better.

*True integration is intentional.* It's about having platforms that work in tandem to create cohesion, elevate client experiences and make stellar service repeatable and scalable.

**② The Multiplicative Power of Partnership**

Used together, *PreciseFP and Zocks accelerate workflows.* Processes that once took days are completed in a fraction of the time. Fewer errors and lost time due to rework make for less stress. Every touchpoint becomes an opportunity to deepen a connection and retain clients.

**③ Freeing Up Time for What Matters**

Integrated data and processes give your team a precious gift: time.

When you remove distractions like troubleshooting, duplication or manual oversight, advisors and staff can invest their time and energy into relational activities.

**④ Positioning for Growth and M&A**

Tech-forward firms are better positioned for expansion. A unified data strategy is a boon in this context, making transitions smoother and ensuring the continued delivery of consistent, high-quality service.

# Own Your Firm's Future with PreciseFP + Zocks

Say goodbye to siloed information and missed opportunities. Say hello to a forward-looking client experience that's both efficient and deeply human.

# Are you ready to unlock the full potential of your firm's data?

## Explore these solutions and take the first step toward an integrated, insight-driven future:

**Start your free trial** of PreciseFP now

**Schedule a demo of Zocks** to get in on the power of conversational intelligence

**Build a smarter, more connected client experience that produces sustainable growth**

## The future belongs to those who turn information into insight and *insight into action*.

[1] McKinsey, February 2025
[2] Investment Adviser Industry Snapshot 2025

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