



trumpet

# Trumpet Success Story

## ASSEMBLAGE SOFTWARE

### Client

Plancorp, LLC

### Industry

Investment Management

### Need

- + Automated Portfolio
- + Report Assembly

### Solution

Assemblage Software

### Results

- + Automated quarterly reporting processes
- + Reduced report delivery time from over 2 weeks to just 5 days
- + Automatically populated client web portal with client-specific reports
- + Dramatically improved report review process
- + Saved a significant amount in printing cost and employee time

**“Trumpet had two advantages over the rest; a better understanding of our business and software that was easier to use.”**

## Plancorp, LLC Saves Time and Money with Automated Portfolio Reporting

### Searching for a Solution

When Plancorp realized they needed a different solution for preparing, sending and filing tailored performance reports to their 700 client households each quarter, they evaluated a variety of technology vendors. Eventually, they consulted with their partners at Charles Schwab and were directed to the workflow experts at Trumpet.

“We talked to a lot of vendors, but Trumpet had two advantages over the rest,” noted Bob Tucker, Vice President of Plancorp, LLC. “First, they had a better understanding of our business. And second, the software they presented was easier to use and more cost-effective.”

### The Assemblage Solution in Action

Trumpet implemented Assemblage software which prepares reports for a variety of purposes, including quarterly performance reports.

At the time, Plancorp was sending 700 client reports with varied content, including a personalized letter, up to ten different Portfolio Center reports, information from an Excel spreadsheet, a disclosure statement and a quarterly newsletter. As the company continued to add clients and produce more reports, it was important to give Plancorp a solution that would not only customize content, but also grow with the business. Additionally, Plancorp already had considerable reporting information within their contact management system. Therefore, they needed a solution that could read that data electronically, rather than having a staff member reenter that information into another software application.

“We started the implementation process by sending Trumpet examples of our existing reporting process, and they quickly came back with a solution,” reported Tucker. The Trumpet team utilized the Assemblage 5-Step Workflow System to automate the process:

#### Step 1: Gather

Assemblage gathers PDF files from directories on the Plancorp server for each client, including disclosure statements, quarterly newsletters, personalized letters, Excel spreadsheets and portfolio reports.

#### Step 2: Split

Assemblage then splits out a personalized report cover for each recipient from a mail merge document generated from Plancorp’s contact management system.



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## Plancorp, LLC

Since 1983, Plancorp, LLC has provided financial advice, estate planning services and asset management to high net worth individuals and families and to small and mid-size institutional clients. Currently, Plancorp, LLC oversees nearly \$3 billion in assets.

### Step 3: Assemble

Next, Assemblage reads data from Plancorp's contact management system and electronically collates each report per recipient in the desired order, dynamically inserts a table of contents and applies branding such as logos and other graphical elements.

### Step 4: Deliver

Once assembled, Assemblage prints reports for mail delivery or uploads them to Plancorp's secure "client vault", depending on the recipients' preference as noted in Plancorp's contact management system.

### Step 5: File

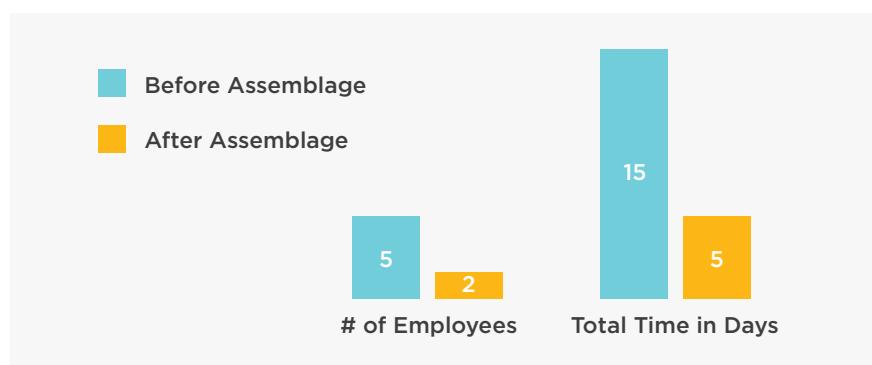
Finally, Assemblage automatically files each report by client into a document management system.

### Time-Saving and Effort-Reducing Results

Before Assemblage, Plancorp used to print preliminary copies for approval. Once approved, final reports were printed and up to five staff members spent many business days hand-collating each report. "That doesn't even include the time it took to complete the approval process," Tucker pointed out. "It used to take us days to gain approval, and we went through reams and reams of paper."

Once the reports were hand-collated and ready for delivery, an additional staff member would spend 3-4 days scanning and electronically filing each report before they could be mailed to clients.

With Assemblage, the firm is now able to prepare, deliver and file customized reports in a fraction of the time - just five days.



**"Not only have we saved significant time and resources, but we can now provide a better experience for our clients."**

Reports are now sent to financial planners for electronic approval, saving the firm both time and paper costs. Once approved, it only takes two staff members less than three days to mail reports to clients who still want paper copies. Electronic versions of the reports are now automatically stored in the firm's document management system and published to the client web portal in a matter of minutes.