

How IT Visionists Helped a Financial Practice Consultant Cut Costs by 30% with Better Lead & Project Management



About IT Visionists

We are a UK-based company with more than 15 years of experience in providing high-quality, dependable, and affordable solutions around making technology work for you, instead of you working for technology. Our experts can translate any customer's business needs into workable solutions involving automation, implementing new processes, and deploying more efficient tools for project management and sales development. We handle every little detail until everything is ready to be used.

About Client!

The Client, a Service Consultant, helps financial service professionals succeed. He provides training, coaching to advisors, recruiters, and executives, and speaks at events.

The Challenge

The client's process of delivering custom materials was cumbersome. It involved sending manual emails with documents and forms for customers to fill out and upload assets. The team would review orders, send agreements and invoices, and only after receiving payment and agreements, they'd give an ETA for the finished product. Customers then reviewed and approved the materials before receiving the final invoice and download links. The consultant needed a faster, smoother, and more efficient workflow for himself and his clients. He asked:

- Can we cut down on manual steps by automating emails or confirmations?
- How can we manage customer assets in one place?
- Is there a way to make payments easier?
- How do we ensure secure delivery to everyone?

The goal was to create a system that would automate sales, workflow, and project management. The client wanted to move away from spreadsheets to better tools fitting their workflow.

Training the team to use new tools effectively was also important. Plus, leadership wanted to know the team's capacity for new projects.



The Solution

IT Visionists provided a coach to understand the business needs. We suggested tools for CRM, project management, proposals, agreements, and invoicing, including Pipedrive, Trello, PandaDoc, and QuickBooks Online, all integrated together.

Pipedrive was set up with templates and automation rules. PandaDoc handled agreements and proposals. Trello organized project workflows, and QuickBooks managed invoicing.

We trained the team to use these new tools effectively.

The Results

- Automated lead management means no missed follow-ups or opportunities.
- Sales have increased.
- Clear visibility of proposal status.
- Better analysis of proposal success rates.
- Project Managers start projects easily with less manual work.
- The team knows what to deliver and when.
- Better visibility of sales and projects.
- Clearer communication.
- Automated workflows save over 8 hours per week across departments.
- Operational costs dropped by 30%, with business growth.

"Dealing with messy workflows used to cost me time and money. IT Visionists analysed my business and recommended tools that automated tasks and improved visibility. Now, everything is streamlined, I've cut costs by 30%, and my sales are up! They're great for any business owner wanting to simplify and grow." **CEO**

Ready to boost your operations' efficiency?

If you're looking to make your business run smoother with expert help and the right tools, IT Visionists is here to help.

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