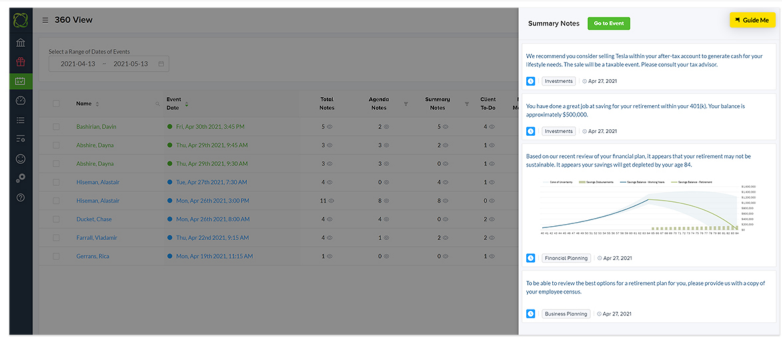
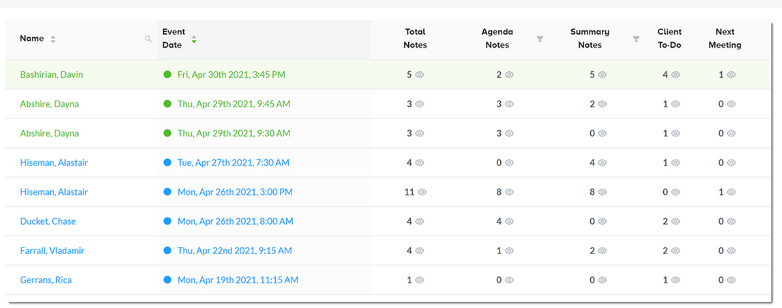
Pulse360 Launches Meeting Intelligence Dashboard & Automatic Task Creation in Salesforce for Wealth Management industry

Eliminate things falling through the cracks

RIVERSIDE, CA, USA, May 4, 2021 /EINPresswire.com/ -- On the 1st anniversary of our launch, Pulse360 announced two new major feature releases. A new meeting intelligence dashboard helping financial advisors keep a pulse on the service standards around client meetings. And, second, the ability to automatically create tasks in Salesforce from Pulse360. Starting May 4, Pulse360 will eliminate the double work that financial advisors in the Wealth Management industry currently do to send follow-ups to clients and create tasks in Salesforce.



360 View of advice delivered to a client



Name	Event Date	Total Notes	Agenda Notes	Summary Notes	Client To-Do	Next Meeting
Bashirian, Davin	Fri, Apr 30th 2021, 3:45 PM	5	2	5	4	1
Abshire, Dayna	Thu, Apr 29th 2021, 9:45 AM	3	3	2	1	0
Abshire, Dayna	Thu, Apr 29th 2021, 9:30 AM	3	3	0	1	0
Hiseman, Alastair	Tue, Apr 27th 2021, 7:30 AM	4	0	4	1	0
Hiseman, Alastair	Mon, Apr 26th 2021, 3:00 PM	11	8	8	0	1
Ducket, Chase	Mon, Apr 26th 2021, 8:00 AM	4	4	0	2	0
Farrall, Vladamir	Thu, Apr 22nd 2021, 9:15 AM	4	1	2	2	0
Gerrans, Rica	Mon, Apr 19th 2021, 11:15 AM	1	0	0	1	0

Meeting Intelligence - 360 View Dashboard

Financial Advisors can now use their frequently used written advice and attach a task to be automatically created in Salesforce CRM from Pulse360. From that point, anytime the advisor emails the same advice to their clients, a task will automatically be triggered in Salesforce CRM – removing the need to manually create tasks in CRMs and eliminating the chance of something falling through the cracks. With the previously released feature, Automatic Document Attachment (Reg BI), financial advisors can now automate two manual activities with a click of a button – saving them over 50% of their time.

“Today, Financial Advisors manually create tasks in their Salesforce CRM after a meeting. Any time you do something manually, it takes time and has a high chance of having things fall through the cracks,” said Anand Sheth, Founder and CEO of Pulse360. “Our goal in bringing the Automatic Task Creation feature is to make technology work for the financial advisor, bringing efficiency and systematization to their practices. We want to eliminate the chance of things falling through the cracks and eliminate double work."

Pulse360 is also launching the first to market "360 View", a meeting intelligence dashboard tied to client meetings. Today, for client meetings, advisors have to search their email or, worse, interrupt the team to ask what the agenda is or if the agenda was sent to the client. Similarly, after a meeting, the advisor's team manually checks with the advisor if they have entered meeting notes. These are some of the day-to-day operational inefficiencies that cost advisors time and generate unnecessary stress. No more. With our 360 View, advisors and the teams can at-a-glance view what's on the agenda, the sent status, and if follow-ups were prepared and sent to clients – eliminating manual tracking or having to ask the team. And now, with a click, they can see client to-dos or any next meeting items – again, giving them a pulse of action items.

Anand adds, "Clients have a high expectation of service. To meet this challenge, financial advisors need business intelligence tools that give them insight into how efficient they are or if there are any bottlenecks in their practice – especially around meeting notes and action items. The lifeblood of a practice. Now we are automatically providing them this valuable insight."

To learn and ask questions about the new Automatic Task Creation or the 360 View or to see it in action, visit: https://pulse360.com/360-view-meeting-intelligence, or schedule a demo with Anand Sheth by visiting: https://www.pulse360.com/schedule-press/

About Pulse360
Pulse360 was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA. Tim Jenkins, a co-founder of SendGrid and former alumni of Techstars, is on the Board of Advisors.

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