

Pulse360's Bulk Add Automation helps Financial Advisors Scale by Documenting 100+ Meetings with a single click

Enabling Surge Meetings for Financial Advisors

RIVERSIDE, CA, USA, August 19, 2021 /EINPresswire.com/ -- [Pulse360](#) announced a major new feature release, [Bulk Add Automation](#). Starting August 19th, Financial Advisors can scale their practices by documenting agenda items or follow-ups for 100+ meetings with a single click.



The ability to accomplish so much with literally one mouse click will free up even more of an advisor's time for those all-important client interactions."

Brian McLaughlin, CEO of Redtail Technology

"Our focus has been to make financial advisors 50% more productive so they can serve more clients," said Anand Sheth, Founder and CEO of Pulse360. "Advisors can spend 25-minutes just getting ready for a single meeting and another 25-minutes with follow-ups, creating tasks and triggering workflows. The new Bulk Add Automation feature will help advisors do all of this with a click and in seconds for 100+ meetings – saving them over 40 hours."

Advisors can be prepared for the next 90-days worth of meetings in seconds. Currently, advisors will manually work on a single client to prepare an agenda, create related tasks or trigger workflows – easily spending 25-minutes per single meeting. Now, financial advisors can select 100+ client meetings and just click Bulk Add Automation and they are done. For example, advisors can add 100 notes, 100 tasks, and trigger 100 workflows across 100 different clients. Our automation will then create the 10,000 notes, 10,000 tasks and 10,000 workflows started in their CRM (Redtail CRM, Wealthbox CRM, or Salesforce CRM) in seconds.

"The updates to what was already a deep two-way integration between Redtail and Pulse360 are certain to make a lot of advisors very happy," said Brian McLaughlin, CEO of [Redtail Technology](#). "The ability to accomplish so much with literally one mouse click will free up even more of an advisor's time for those all-important client interactions."

Pulse360's Bulk Add Automation puts more time back in an Advisor's week to see more clients. Anand said, "The question every advisor will be asking is, "How much can I grow with the additional capacity created by automation?"

To learn and ask questions about the new Bulk Add Automation, schedule a demo with Anand Sheth by visiting: <https://www.pulse360.com/schedule-press/>

About Pulse360

Pulse360, a 2021 Wealthmanagement.com Industry Awards Finalist, 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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