



## CASE STUDY

# Presper Financial Architects Modernizes Phone System with Local Support from CTG

**Presper Financial Architects**, an independent and full-service financial planning firm with locations in multiple cities within Ohio, provides retirement planning, wealth management, insurance, and estate planning for individuals.

## ISSUES

- ! Moving to new locations
- ! Needed an IP-based phone system
- ! Needed flexibility for remote work
- ! Needed integrated phone system
- ! Needed local implementation support

## CTG SOLUTIONS



Easy to reach,  
local technical  
support



Implementation  
of hosted phone  
system, integration,  
and training



Ability to complete  
work remotely



Intimate technical  
support for  
UCaaS system

## CHALLENGE

At Presper Financial Architects (Presper), leadership knew they needed an updated phone system that would integrate with their client relationship management (CRM) software, Redtail.

One challenge was searching for local support that could help them implement their new phone system. Another challenge was moving their physical locations. With a move and a new hosted phone implementation, local support was necessary. Chris Jordan, the business manager for Presper, knew that this was a bigger job than initially anticipated.

## SOLUTION

To address the lack of local support, it was suggested by a hosted phone provider that Presper utilize Corporate Technologies Group to scope the installation, implementation, and needs for Presper. Corporate Technologies Group would help replace their current premise-based Iwastu phone system with a new hosted phone system that allows the flexibility to work anywhere and integrates with Redtail, as well as provide on-site training for employees.

Redtail assists financial advisors in their efforts to strengthen their client relationships, improve the team's collaboration efforts and overall efficiency, increase their revenues and profitability, decrease client attrition, or engage in other business-building activities. Some of the integration functionality between Redtail and the hosted phone provider are:

- **Screen Pop:** Customer information and note history automatically Pop Up with incoming and outgoing calls.
- **Log Phone Notes and Call Activities:** Make notes during your calls that are automatically added to your Redtail client records. You can categorize and set "priority".
- **Date:** Incoming and outgoing calls are automatically logged in the notes section of your client's contact page.
- **Click-To-Dial:** Efficiently make outgoing calls, receive incoming calls, and refer back to your call history log right in Redtail.
- **Video Conferencing:** Make any contact a video meeting. Host virtual meetings and screenshare critical documents to mitigate misunderstandings and allow the advisor to capture pertinent communications for continuity.

## RESULTS

On the day of the cutover from the Iwastu phone system to the new hosted phone system, Corporate Technologies Group was on-site to ensure that employees' implementation and training went smoothly. Working with a technology partner that understood the importance of a tightly-integrated phone and software solution made things much easier for the client.

**"I have someone that I can call that will listen to me and get me answers."**

— Amy Hescht, Presper Financial  
Information Technology Manager