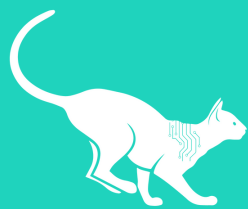


# ESSENTIAL AUTOMATION TIPS

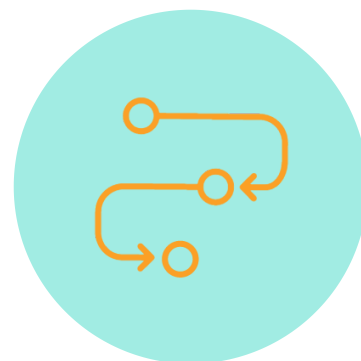


TOOLS FOR A SUCCESSFUL  
FINANCIAL PLANNING BUSINESS



## DEFINE YOUR PROCESS

Get clear about where you waste your time—whether it's on administrative stuff you really shouldn't be doing or on repetitive tasks you'd be better off delegating to an app. Try using a time tracker!



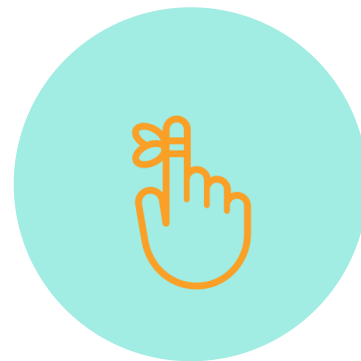
## USE AND OPTIMIZE SCHEDULING SOFTWARE

Prevent double booking and eliminate the back and forth emailing trying to nail down a time and date.



## GENERATE REPEAT BUSINESS AND SEND REMINDERS

Be proactive by automating prompts for future sales. Use automation software to send appointment reminders via email after clients complete a web form containing the client's name, email address, and appointment date and time.



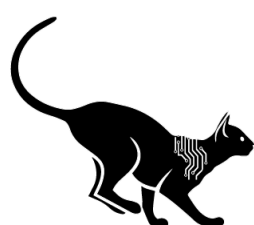
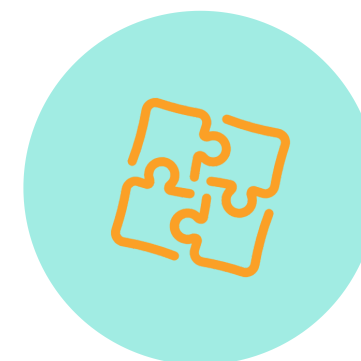
## CREATE A SEAMLESS CUSTOMER EXPERIENCE

Collect and process paperwork as fast as your client can upload it and employ status tracking in one central location so you know what is complete and what still needs to be completed.



## INTEGRATE YOUR APPS AND PLATFORMS

Move data between apps and systems so you'll never miss a step with automated file transfers.



SPHYNX  
AUTOMATION

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