

Technology gives this firm what it values most: time with clients

Capital Investment Advisors has always put clients first. Today, what enables them to serve clients fully is a robust technology suite, including Schwab's digital tools. "All of our decisions about technology come down to one question," says Matt Reiner, Managing Partner. "Are we giving our team more time to spend with our clients?"

Capital Investment Advisors knows well the benefits—and challenges—of building a digital-first firm. Reiner shared lessons he's learned along the way.



To build a digital company, build a digital culture.

"We instilled what we call a Culture of Learning. We want everyone to feel empowered to suggest changes in our digital processes or take the lead on new digital tools we might use. Trying new things may mean running into challenges and hurdles—and even failing. We strive to learn from it."



Prioritize tech investments that support your firm's strategic goals.

"Don't try to tackle it all. Focus in on one business vertical. If you want to spend more time with clients, look at ways to automate routine tasks. Utilize the tech consultants at Schwab to be sure you're investing in technology your firm actually needs."



To spur client adoption of technology, educate, reassure, and repeat.

"On the client side, it's about expectation-setting, communication, and hand-holding. We're transparent with clients that this may be new and uncomfortable. But we assure them we're going to be right here and we communicate that time and time again—over the phone, in person, over video, and via email. That gets us buy-in."



Harness the full power of your CRM.

"A lot of the industry uses the CRM like a big, expensive Rolodex. But there are so many capabilities, from automated workflows to integration. For example, Salesforce can integrate into calendars and your email marketing like HubSpot or MailChimp. Your vendors and Schwab's consultants can help you think through it."

"Ultimately, this is a human business."

Matt Reiner

Managing Partner
Capital Investment Advisors



Capital Investment Advisors



Atlanta, Tampa, Denver



40+ employees



Founded 1996



\$3B AUM

Schwab tools I rely on

- Schwab Advisor Center® tools: Digital account open and move money with eAuthorization
- Schwab Alliance
- DocuSign integration
- Data integration—Schwab and third-party

Key third-party tools

- Black Diamond
- Salesforce
- Benjamin
- eMoney
- HubSpot
- Calendly
- Video conferencing

How they did it: a successful DocuSign adoption campaign

Over about 18 months, Capital Investment Advisors saw the adoption of DocuSign surge. While COVID was a factor, so was the firm's commitment to helping clients use the tool with confidence.



Percentage of firm documents approved by clients through DocuSign

At Capital Investment Advisors, client adoption of digital technologies always begins with internal adoption. Here's how the company tackled their successful DocuSign integration.



1. Set a timeline

We gave ourselves 90 days to get DocuSign fully integrated and up and running.



2. Assign a project owner

We gave one person primary responsibility for the project. They worked with representatives at DocuSign, Schwab, and our CRM to get everything integrated.



3. Expand adoption to your team

That owner became our internal expert. They helped train everyone else in our firm and troubleshoot early issues.



4. Roll it out to clients

Client adoption requires education. You need more communication, more quick phone calls. That's just part of our commitment to service.

Ready to give your team more time to spend with your clients?

No matter where you are on your digital journey, we've got you covered.



Learn how to jumpstart your digital journey
advisorservices.schwab.com/jumpstart

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