



How Wheelhouse Advisors took their practice to the next level.

Wheelhouse Wealth Advisors, a Raymond James provider, is committed to delivering thoughtful service and tailored strategies that center on their clients' needs. In business since 2007, the financial planning advisors focus on serving business owners, families, individuals, and retirees and ensure mutual respect and understanding is in every exchange.

Projecting stability and providing quality service is paramount to the firm's success. Back in 2014, Wheelhouse had seen an increase in the number of clients served, but wanted to scale for even greater growth. "Following the advice of a business development consultant, we realized the importance of having a live person answering our calls," says John Postizzi Jr., Branch Manager, Financial Advisor at Wheelhouse Wealth Advisors.

In the world of wealth advisors, it's also valuable to eliminate the distractions and interruptions that can be costly. "In the afternoon, we can receive six or seven calls from wholesalers that take up much of our time and those disruptions can really add up," says Postizzi. "With Ruby on the phone, we don't have those interruptions and can be much more productive with our time and for our clients."

"Having a friendly professional on the line improves our overall brand reputation and shows we're committed to our customers every step of the way. We knew we didn't want to hire an in-house receptionist because in this line of business that's no small undertaking. It would require a thorough screening process and fingerprinting in order to deal with all of the sensitive information related to this line of work."

PERFECT FIT FOR FINANCIAL ADVISORS

After months of interviewing several virtual receptionist services, Wheelhouse chose Ruby. "The others weren't even close," noted Postizzi. As advisors on financial matters, it's no surprise that a considerable part of the selection decision was one of cost. "Retaining Ruby is much more affordable and practical than hiring a person to our team," says Postizzi. "More than that, what Ruby does is unique and for what we do as wealth advisors, it's a perfect fit."

John's colleague at Wheelhouse, Nancy Malone, Financial Advisor and Client Service Manager, fully agrees. "Retaining Ruby's services certainly allows us to project depth of team and stability, yet it's so much more than answering the phone," she explains. "It's the little things. For example, not asking how to spell a client's name helps our clients feel like they spoke to someone who knows them. That's incredible!"

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CONFIDENCE & FLEXIBILITY

Having confidence in who is answering their phones goes a long way for this powerful team of two. Every day is different – from scheduled appointments and financial reviews to walk-in inquiries from a neighboring accounting practice. The need to focus on deadlines and client service requires a considerate and reliable receptionist handling the phones.

“Because there’s only two of us, it’s difficult to answer the phone while giving clients our full attention,” Postizzi says. “There can be evening appointments. Something could come up during the day. We must stay focused yet flexible and be able to react to what the day brings and of the needs of our clients.”

“Using Ruby allows us to stay focused on serving our clients, whatever their needs,” says Postizzi. “We can work remotely yet stay up-to-the minute informed on anything needing our attention. In fact, I can even go fishing and still get calls and not worry about the phone being answered.”

NO ANTISEPTIC INTERACTION

The challenge was simple: have a real person answer the phones and allow the Wheelhouse team to focus on tasks at hand and be more productive. The solution was equally simple yet quite special, according to Postizzi. “Most of the services we’d interviewed were nothing like Ruby,” he says. “They were antiseptic with responses such as ‘They’re at lunch, you can call back or we’ll take a message.’ We didn’t want clients to have that sort of interaction.”

He adds: “When we found Ruby, it was very different. It’s a real person answering the phone, as if they are in our office, and we get the messages immediately – it’s very straightforward.”

Malone is in full agreement and adds, “Ruby does such a good job that our clients want to know where our new employee is, asking, ‘Where’s that kind receptionist I spoke with on the phone?’ That’s the level of service we want our clients to expect from us and Ruby certainly helps set us apart. We sing the praises of Ruby almost daily!”

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John Postizzi Jr. Branch Manager, Financial Advisor, and Investment Management Consultant



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