**Connecting the Dots**

By David L. Lawrence

There is much to be said for technology. Technology connects us to the world. It allows us to communicate with each other and it also allows financial advisors to do their jobs more efficiently, when such technology is used correctly. One area of technology that is especially valuable is the ability to sync data between divergent systems such as a computer and a laptop or mobile device. It is this area that is often misused, mishandled or ignored by financial advisory firms.

Google, one of the pioneers in syncing software solutions, recently announced that they have ended offering Google Calendar Sync to new users. For now at least, existing users can continue to use the solution. However, in time, that may go away as well. Google Calendar Sync was a free solution from Google, intended to encourage use of Google Apps, which are not necessarily free. However, with a variety of new sync protocols, Google determined that this particular solution was not warranted going forward.

According to Google, “Google Sync was designed to allow access to Gmail, Google Calendar, and Contacts via the Microsoft® Exchange ActiveSync® protocol. With the recent launch of CardDAV, Google now offers similar access via IMAP, CalDAV, and CardDAV, making it possible to build a seamless sync experience using open protocols. Starting January 30, 2013, consumers won't be able to set up new devices using Google Sync, however, existing Google Sync connections will continue to function. Google Sync will continue to be fully supported for Google Apps for Business, Government and Education users who are unaffected by this announcement.”

The reality is that, while this was a good solution, many software firms that support the financial advisory community have already offered their own solutions, fully integrated with a compliant sharing protocol. Redtail Technology, for instance, last year began offering their Desktop integration and mobile integration solutions for free to existing and new subscribers. Redtail CRM Mobile ([www.redtailtechnology.com](http://www.redtailtechnology.com)) provides Financial Professionals with an on-the-go option for keeping up with what is going on with clients, as well as office staff. Accessibility from anywhere means the ability to work with client information is at your fingertips – making adding notes, viewing calendar items and so much more easier than ever. The Redtail CRM Mobile solution offers the ability to view client information on the fly, view and/or add client notes, tap to dial phone numbers and even tap to email clients or other contacts in the database. At present Redtail offers this technology for IPhone/IPad, Android and Blackberry users. But, with the growing popularity of the Microsoft Windows phones and Surface Tablet devices, it should not be long before these devices are supported as well.

Junxure has long offered the ability to capture emails from Microsoft Outlook and sync them with their CRM database. However now, Junxure is offering Junxure Mobile ([www.junxure.com/public/products/junxure-mobile.html](http://www.junxure.com/public/products/junxure-mobile.html)) which provides direct access to the client relationship database from any mobile device (laptop, tablet or mobile smartphone). Not only can you see the data, you can enter new contacts, notes, view records and assign tasks to your staff from anywhere. The mobile solutions from Redtail and Junxure can substantially increase efficiency and response time, by presumably being able to assign a task to a staff person in your office while still sitting with the client at a remote location.

ProTracker Software ([www.protracker.com](http://www.protracker.com)) offers ProTracker Cloud™ which provides an internet based access to their Client Relationship Management (CRM) software. It is basically a full version of your database accessible from anywhere.

Salesforce ([www.salesforce.com](http://www.salesforce.com)) also offers a cloud-based solution with mobile accessibility tools. Critical records and information are at your fingertips no matter where you are with Salesforce Mobile. You'll stay on top of late-breaking developments in real time from anywhere, making it easy to collaborate with your team and seal the deal quickly. Salesforce also offers Chatter Mobile, which is a dependable Instant messaging feature with enhanced functions to allow the user to update their status (in-meeting, available, etc.), monitor a conversation thread, upload photos or other docs and even place a phone call.

Another alternative to the Google Calendar Sync solution is offered by Fieldston Software ([www.fieldstonsoftware.com](http://www.fieldstonsoftware.com)). Their product, named gSyncit v3.x, costs $19.99 but offers a wide range of sync capabilities. gSyncit is a Microsoft Outlook add-in that allows for the synchronization of Outlook calendars, contacts, notes, and tasks with your Google account. In addition, gSyncit also supports synchronization between Outlook and Toodledo, Pocket Informant Online, Evernote, Dropbox, Simplenote and Nozbe. And, depending on the software being synced, you can sync Calendars, contacts, tasks and notes. gSyncit supports Windows 8 and the new Outlook 2013 which is being used in the newer Microsoft Office Surface tablets and other mobile devices. One of the functions of this software is to match items so that duplication does not occur, a common problem inherent in the now discontinued Google Calendar Sync solution.

Apple software ([www.apple.com](http://www.apple.com)) has also been a leader in syncing solutions. Their MobileMe solution has closed and Apple has now introduced the iCloud solution. iCloud software is built into every new iOS device and new Mac laptops. It has the capability to store your calendars, email and documents and keep them all up to date across all your devices. Assuming all of your devices are connected to iCloud, a change made to one device will be updated on all other connected devices automatically. Team calendars for instance can be updated on the fly so that every team member is instantly updated. Best news of all, it is free.

One of the first solutions in this space was Microsoft ActiveSync. Microsoft offers both a personal version and an exchange server version. Microsoft Exchange ActiveSync enables devices to synchronize your Inbox, Calendar, and other items with Microsoft Exchange Server mailboxes. However, several issues have been reported with respect to this software, including security issues. One of the more annoying issues has been the calendar reminders on past calendar entries that were presumably closed, but continue to repeat on sync’d devices long after the fact (over a year in some cases). For these and several other issues, Microsoft has set up a support page that addresses the problems and potential solutions. It can be found at <http://support.microsoft.com/kb/2563324>.

Sharing data is becoming a common theme with financial advisory firms. Having the ability to make better use of mobile devices translates into a more efficient and productive practice. When a mobile advisor is meeting remotely with clients, having the ability to access real-time data and information along with the ability to assign tasks to staff members back at the office, all while still sitting with the client, is an impressive service deliverable to that client. It demonstrates that the firm and/or the advisor are willing do whatever is necessary to provide the highest levels of efficient service.

David L. Lawrence is Founder and President of **The Efficient Practice**. Efficient Practice is a consulting firm that provides financial practices, broker dealers and independent firms with comprehensive, profit-driven efficiency consulting, technology solutions and resources. For details, visit [**www.efficientpractice.com**](http://www.efficientpractice.com).