

Equitem use MindMeister, MeisterTask and G Suite to Help Clients Achieve Financial Peace of Mind

SUCCESS STORY



Bradley Ellison
Director & GM

REGION

Australia

EMPLOYEES

9

INDUSTRY

Finance

WEBSITE

www.equitem.com.au

- Equitem use MindMeister to create bespoke mind maps collaboratively with their clients, planning out financial progression.
- The aims and objectives from these mind maps are then translated into actionable tasks, within MeisterTask.
- A cloud-based alternative to previous tools which enables the team to work remotely, while saving time and money.



The fact the tools are accessible from anywhere, on any device, means we can easily keep everyone on the same page.



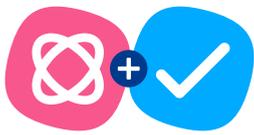
Bradley is the Director and General Manager of Equitem – a company developing financial strategies for families and small business owners. The company's mission is to provide financial peace of mind for all their clients, by achieving clarity and certainty over their finances.

Founded in 2001 the company employs a team of 9 and is based in Perth, Western Australia. Although they have a shared central office, their financial advisers are fully mobile so in addition to using MeisterTask, MindMeister and G Suite across their regular desktop computers, they also utilize the cloud-based tools on their laptops, Chromebooks and Android phones, while at remote meetings and when making client visits.

Finding cloud-based and shareable tools

Previously Bradley and the team at Equitem were using MS Exchange for Outlook "with a large and costly server and network to run and maintain" so the team decided to migrate to G Suite. The swap made an immediate, positive impact, as the cloud-based enabled the company to simplify their back-end and begin saving money on hardware and support.

Similarly, for remote client meetings, the team needs tools which they can both use on the move and share with clients. This is where the team found MindMeister as like G Suite, MindMeister is cloud-based. The two



integrated tools allow the Equitem team to contribute to Google Docs and mind maps shared with clients in real-time, while also being able to access shared email accounts and calendars when away from the office.

Bradley explains “We researched mind mapping solutions and trialed many alternatives before selecting MindMeister. The balance between price and functionality resonated with us.” The team found MindMeister easy to use and with lots of integrations they could find useful for their workflow, Bradley decided to sign the whole team up. For task management the team were previously using Trello but decided to change over to MeisterTask in order to integrate with MindMeister, which Equitem were already using with all of their clients.

Client liaison with collaborative mind mapping

Bradley describes that the team’s advisers “mind map a client’s entire current family or business financial situation, then map the ‘perfect world’ strategy, in order to identify the gaps that can then be resolved.”

The mind maps, which could include client details such as their current assets, liabilities, income, expenses, investments, as well as their family tree and goals and objectives, are added to throughout the advisory process and shared with clients, so the families and companies can remain on the same page with the progress the team at Equitem are making.

As part of this advisory service, members of the Equitem team use the MindMeister presentation mode to present to clients. Bradley claims that using MindMeister for this has cut presentation times by half, due to ease of exporting existing information as impressive presentations. The team then ultimately export the detailed mind maps as PDF documents, in order to formulate final documents and reports.

Using the G Suite integrations with MindMeister Equitem’s client work is enhanced. Clients are able to access their maps via their own Google logins and the team can use the Google Drive integration, and ability to attach Google Docs and Google Sheets via embedded links, to share information with clients, via their bespoke mind maps. These features enhance the support provided by Equitem to their clients, by enabling their mind map to be the one place where all information on current figures, project objectives and progression can be stored for each client.



Having a history of all completed tasks is invaluable.



This client liaison process is then taken forward using MeisterTask as the agreed client mind map, including all aims and objectives, is translated into a project on MeisterTask using the MindMeister and MeisterTask integration. The Equitem team then add any additionally important

documents to the respective tasks and using the email card integration to turn actionable emails into tasks, and the Calendar integration via Zapier, the team ensure no important information, tasks or dates will be lost. “Having a history of all completed tasks is invaluable” so as Bradley explains, like the knowledge maps developed through MindMeister, MeisterTask and the G Suite provide a great archiving tool, via the cloud, making all client information accessible, while preventing their server from clogging up.

Results

Through the company’s joint use of these cloud-based tools – G Suite, MindMeister and MeisterTask – Equitem have been able to develop an efficient workflow between collaboratively working with clients while creating a bespoke mind map, available easily to clients also via their Google logins, to then transforming these detailed knowledge maps into actionable tasks, via the MindMeister and MeisterTask integration.

For Equitem there have been a number of benefits from using these tools. Bradley shares that “the tools have been cheaper and provided a richer functionality, with presentation times halved and client meetings streamlined. It’s incredibly easy updating our team via the embedded communication features and the fact that the tools are accessible from anywhere, on any device, means we can keep everyone on the same page.”