



HARMON SMITH
FINANCIAL GROUP

--- How Mobile Assistant Scripts Helped the Harmon Smith Team Create Alignment ---

Josh Harmon has been in the financial industry for close to 20 years. Along with Randy Smith, the two formed Harmon Smith Financial Group under the Northwestern Mutual Financial Network umbrella, located in Boise, ID.



The Harmon Smith team focuses on family first; helping them to build roadmaps for the present, for retirement, and for legacy. What drives Josh in this realm first and foremost is creating that peace of mind for his clients and making sure to be always tuned in to his client's needs.

The Challenge of Harmon Smith Financial Before Mobile Assistant:



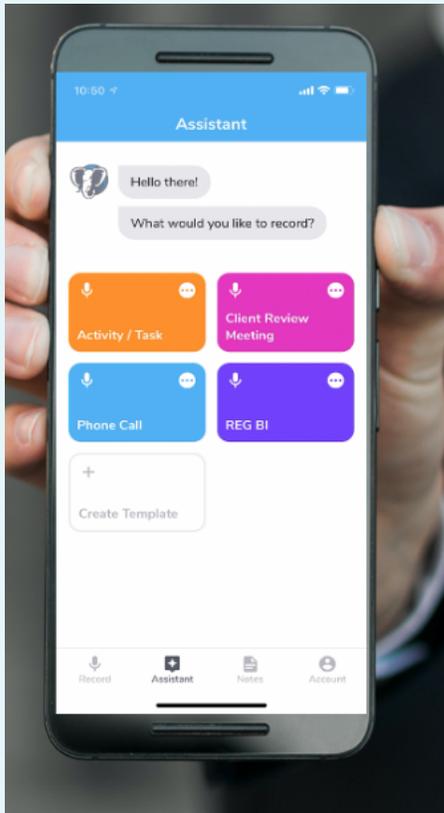
- *Because Josh's focus on his client's needs is so vital to his business, when building the firm, he and his team realized that certain day-to-day activities needed to be dealt with in a more efficient manner. This particularly included the piles of notes that needed to be read, organized, and highlighted in order to stay on top of tasks and activities to further aid closing business deals and keeping clients happy.*

Why Harmon Smith Financial Chose Mobile Assistant:



- *Josh first heard about Mobile Assistant through word of mouth from other financial advisors. He was curious to see if this could be a tool to help his team with the aforementioned workload and help increase their workflow efficiency from day to day. After Josh gave Mobile Assistant a test run, he found this service was the missing piece to the puzzle of workflow efficiency. The rest of the Harmon Smith team jumped on board as well and, in a short time, fantastic results were seen.*

Key Factors in How Mobile Assistant Helped Align the Harmon Smith Team:



- *“Templates = success.” Josh and his team created their own unique templates to be shared across the board with all dictators. These templates are now used with every client interaction. “This is extremely helpful for the administration staff to know exactly where to look for the information they’ll need to create tasks and continue the workflow.”*

- *“Mobile Assistant templates help keep our thoughts organized and ensure that every report that comes back looks the same.”*

- *Mobile Assistant has saved them thousands of dollars in money that would otherwise be spent on administration staff taking time to type, edit, copy, and paste notes into the CRM.*

- *Mobile Assistant has helped the team create efficiency, which further leads to client satisfaction and overall team cohesion.*

The Results

Once Josh and his team realized that the transcribed notes came back in a flawless, structured, and organized fashion, they decided to keep the momentum going; the staff put their heads together and came up with templates that would keep them all on the same page. They came up with three outlines, which Mobile Assistant's staff then put into place for each advisor that would be dictating. Six years later, these templates are still in place and allow the Harmon Smith advisors to have a cohesive process of keeping their notes organized, letting administrative staff know exactly what sections pertinent information will be in, and the ability to continue a daily workflow that is not interrupted. If you would like to see examples of how these templates can help you, see below to get in touch with the Mobile Assistant client success team!



Let Mobile Assistant help your Team! Visit www.mobileassistant.us or schedule a Success Session below to learn more!

[Schedule Success Session](#)