

United Capital saves 56.75 person-weeks.



“We don’t talk about two week sprint cycles any more. Our sprint cycles are in days now.”

— **Brandon Gage**, Senior Vice President of Technology, United Capital Financial Advisors, LLC

Overview

In 2014, United Capital Group began a campaign to both improve the accuracy of its customer information and to maximize business growth. Rather than acquiring more advisors and offices, the company sought to generate dramatic organic growth, with plans to grow assets and revenues by two-and-a-half times over the next three to five years.

To support this growth, United Capital chose Skuid to dramatically re-engineer the user experience of their existing Salesforce® implementation.

Results

56.75

initial person-weeks saved

\$454,000

initial implementation savings

30

ongoing person-hours saved each week

Challenge

Leadership at United Capital realized that to proactively drive both revenue growth and customer-success, the user experience of their data management system needed to dramatically reduce the amount of work necessary to complete many tasks. In theory, a better user interface could shorten sales cycles, improve employee productivity and in turn, generate more revenue.

Prior to using Skuid, United Capital Group had tried customizing the user experience of Salesforce® with Visualforce, a code-based user interface framework. The IT team found Visualforce to be frustrating. Visualforce pages required a developer to make even the smallest changes. With limited IT resources, their backlog grew and due to other priorities, the Visualforce interface remained basically static.

Business users did not like the results of Visualforce either. Visualforce pages lacked the speed and ease-of-use they sorely needed to get their work done and meet their goals. Many simply refused to use the system.



Brandon Gage,
Senior Vice President of Technology,
United Capital Financial Advisors, LLC

Solutions

United Capital chose to deploy Skuid as a replacement for Visualforce development. Initially, Skuid delivered advanced training to United Capital's IT staff, who quickly mastered Skuid and rolled out their own internal Skuid user training program.

United Capital used Skuid to build a best-in-class user experience, mapped to its unique business processes. Throughout the initial rollout, Skuid provided ongoing support to assist United Capital IT staff as they got up to speed. Today, United Capital is self-sufficient, using Skuid to continuously iterate their user experience as the needs of its business evolve.

Results

"Skuid is a complete reinvention of how we think, how we work, and how our employees are engaged," says Brandon Gage, Senior Vice President of Technology for United Capital. "The Skuid solution is intuitive, easy on the eyes, and fun to use. Clean, simple key visuals at the top of each page provide users with all the data they need. Customer prospects are always visible and organized in four sales-cycle stages. It is so easy there is no need for training manuals or checklists."

Choosing Skuid generated \$454,000 in initial development cost savings and significantly improved user adoption and customer data accuracy. The company recovered more than 56 person-weeks by eliminating time-intensive, hand-coded interfaces.

The results go far beyond cost savings for IT. The impact is significant to the business users as well. "You can save so much time by having happy users," notes Gage. "Skuid makes data actionable on every single screen," says Gage. "There is no other tool...you can bolt on and say that. Skuid is a quantum difference."