TITAN

Client Data Collected In Half The Time For Trilogy Financial Services

Industry:	Customer Since:	Products:	Features:
Financial Services	2021	Experience Studio	Forms, Automation, Flow

COMPANY BACKGROUND

Trilogy Financial Services is a Registered Investment Advisor (RIA) founded in 1999 and headquartered in Irvine, California.

The firm supports clients across retirement planning, college savings, estate planning, and insurance, managing over $4.3 billion in assets through a nationwide team of more than 70 advisors.

TRILOGY FINANCIAL SERVICE'S CHALLENGE

Client data in Salesforce was only updated during intake and annual reviews, leaving long gaps where key information became outdated.

Teams captured information through handwritten notes and manual re-entry, creating incomplete and inconsistent records.

When critical data was missing, account openings, rollovers, and servicing tasks stalled, delaying outcomes for both clients and advisors.

TITAN'S SOLUTION

Trilogy Financial Services deployed Titan Experience Studio to connect structured digital forms directly to Salesforce.

A guided stepper form, triggered ahead of client interactions, captures personal, identification, and employment data with file uploads syncing to Salesforce in real time.

Automated workflows manage delivery and follow-up, eliminating manual re-entry entirely.

KEY RESULTS

- **Client Data Collected in Half the Time:** What once took a week now happens in days, with clients completing updates through a direct link and data written straight into Salesforce.
- **Reduced Advisor Admin:** Client information is captured digitally and synced to the CRM, removing manual data entry and freeing advisors to focus on client service.
- **Higher Data Accuracy:** Salesforce records stay complete and up to date, with forms guiding clients to fill in missing or outdated information.
- **Fewer Delays in Client Workflows:** Account openings, rollovers, and servicing tasks are no longer held up by incomplete or outdated data.
- **1-Minute Risk Profiling:** Clients complete risk assessments in under a minute, with results instantly available in Salesforce for portfolio alignment.

> *"By making our data collection dynamic, Titan has had a profound effect on our data integrity and quality."*
> **-Joshua Henrickson, Director of Technology at Trilogy Financial Services**