

## Narrate – an adviser's view



Advisers are already changing the way they carry out their client reviews by using Narrate. Here Karen El Karti, director at Caledonian Financial, explains what Narrate has done for them.

Narrate is simple to use but produces very powerful information for our clients.

Before we had Narrate we gathered information from different sources, but now we can get it all in one place, which is much quicker and makes us more efficient.

The sliding scale is invaluable, instead of going to see clients with static information we can now use the interactive graphs to go over their investments with them. This means we can answer any questions they may have on the spot.

Our clients think that it is very transparent and shows them everything they could possibly want to know about their investments.

We like being able to brand the report with our logo because ultimately it is our services we are selling.

All of our process are documented and standardised where possible so the fact that we can have standard 'Caledonian' reports which are used by all advisers but the advisers also have the ability to tailor reports to suit the needs of each individual client is great.

In addition, being able to add comments to the reports is fabulous and again make it so easy to tailor information to each individual clients' needs.

It is also useful to be able to set access to each of the reports and helps with segregation of duties.

The one thing I would say to anyone thinking of using it would be: Go for it, it will simplify your client reporting and make your office more efficient.

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