

**Beyond the  
Whiteboard:**

# **How Cahaba Wealth Uses Hubly for Multi- Office Efficiency and Growth**



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# Cahaba Wealth is a comprehensive financial planning firm with offices in Atlanta, Nashville and Birmingham.

It's an ambitious organization with humble roots — since its founding, in 2009, the company has grown from a solo shop to a team of 19.

Managing that growth across multiple offices across the country requires keeping people coordinated and communicating effectively. That's where Hubly comes in.

In this case study, we speak to three Cahaba employees — Chris Conkell, a partner and advisor at Cahaba's Atlanta office, associate advisor Josh Hegland, and Jacquie Webster, associate advisor and Nashville team lead — about the role Hubly has played in helping the firm grow, and where they're going with it next.

## PART ONE: THE 30-DAY TRANSFORMATION



Conkell is in many ways your typical financial services professional — always on the go, always juggling multiple clients and responsibilities. “I live where my own two feet are,” he told us. And while that may have worked when Cahaba was a smaller firm, at a certain point, the need for better processes became apparent.

Before Hubly, I used to lay in bed at night thinking, ‘Did I get done everything I needed to?’

-Chris Conkell

This isn't just about missing a client to-do; in a large, distributed organization like Cahaba, a single mistake can have a butterfly effect — everything downstream of it will suffer; in other words, “one thing interrupts your ability to get things done.”

Hubly gives Conkell and everyone else on the Cahaba team the high-level visibility they need to manage things across multiple locations. Cahaba automates task assignment in Hubly to distribute work more efficiently among household-based client service teams. Hubly is the “common language across all offices,” as Conkell puts it, for keeping tabs and providing clarity on what needs to be done.

“To be able to build workflows, delegate tasks to advisors and the client service team,” Josh Hegland added. “Hubly’s been able to integrate across our team, across our different offices and create new solutions.”



## **Creating a Single Source of Truth**

Cahaba uses Hubly to manage every step of the process around client onboarding — prepping for meetings, assigning tasks, and following up afterwards. Before Hubly, managing this work between offices and employees was a challenge. Now, with Hubly, anyone can step in and see who’s responsible for what, and where things stand.

Hubly allows us to quickly keep track of where we are in bringing a new family onboard,” Conkell said. “It’s just how we get our job done, on a day-to-day basis.

-Chris Conkell



At Cahaba, however, Hubly isn’t limited to a single use case. Because it contains every one of their key processes, and maps them out step-by-step, Hubly serves as a source of truth for Cahaba’s institutional knowledge.

“Everything we do as a firm, Hubly helped us define, from start to finish,” Conkell said. “It’s provided a structure for new employees to come on, even if they have no prior experience in financial planning.”

The result is that, among other things, Cahaba can quickly train up a younger team — ensuring both the continuity of service as they bring in more clients, and the continuity of the business as it grows.

As Conkell put it, “If you want to grow, you should be using Hubly!”

## PART TWO: DIGGING DEEPER WITH INSIGHT DASHBOARDS

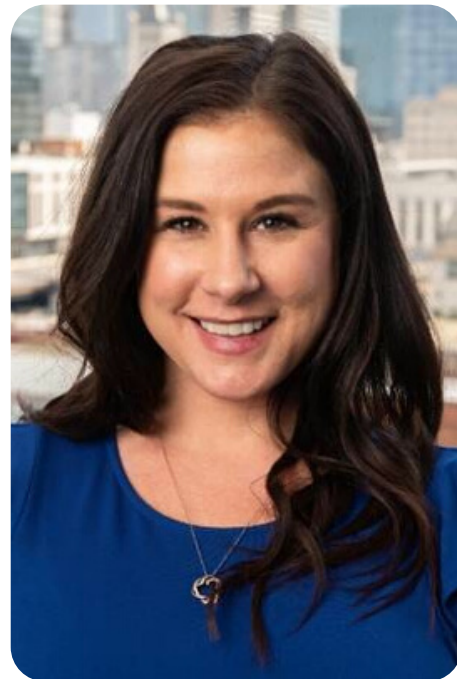
Hubly has proven excellent at managing day-to-day work at Cahaba. With company-wide adoption, client tracking and process documentation in Hubly, Webster began looking for how to leverage the data being produced by the system. Enter the Insight Dashboards, empowering their firm with real-time data and comprehensive analyses of key performance metrics.

### Never Miss a Client Check-in

Cahaba's individual teams, offices and advisors all have different client review cadences. Some clients require check-ins annually; some every six months. Before adopting the Insight Dashboards, Webster manually kept track of reviews in an Excel spreadsheet — a process that required time-consuming data entry, and the potential for errors.

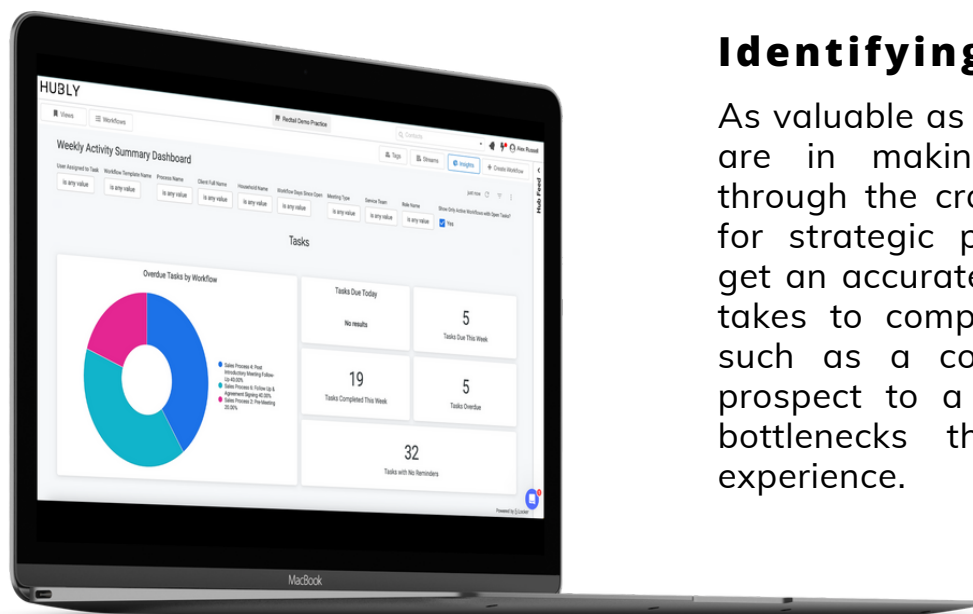
Scheduling clients was one of my highest anxiety points.

-Jacquie Webster



"If you tell [clients] you will be reaching out to them every 6 months to check in, you better reach out every 6 months. You never want a client to feel neglected or that they are not important to you because of lack of communication," Webster told us.

What Webster needed was an easier way of confirming that all clients that needed a review were booked in. Now, she — or anyone on the Cahaba team — can go into Hubly and see instantly which clients are due for a check-in. As she put it to us, "my stress level has gone way down. I can just go to the Hub and get peace of mind."



### Identifying Bottlenecks

As valuable as the Insight Dashboards are in making sure nothing falls through the cracks, it's equally useful for strategic planning. Webster can get an accurate picture of how long it takes to complete a key process — such as a contact moving from a prospect to a client — and identify bottlenecks that affect the client experience.

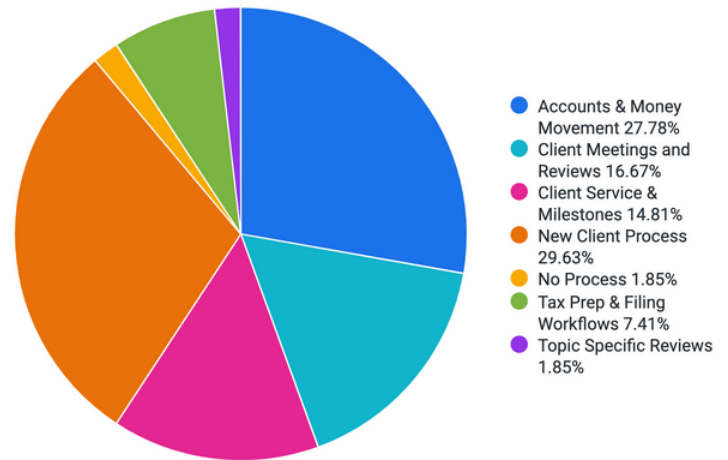


It's also helped her identify seasonal down periods where team members can be directed to focus on non-client tasks. "Going in and seeing, over the past year, what months are the heaviest... it is very helpful to go in and see that, and guide my team."

For Cahaba, Insight Dashboards give actionable intelligence that can inform resource allocation and allow them to create more efficient processes by spotting bottlenecks. Without Hubly, Webster's team would have been dependent on (more) spreadsheets

and manual entry to try to track this information, if they had any time to do it at all. Now, "you can go into the Insight Dashboards and see it for yourself in real time," Webster said. "Awesome!"

Active Workflows by Process



## The Bottom Line: Better Processes for a Growing Firm

Cahaba's example shows how Hubly can be truly transformative for growing businesses, particularly those with multiple advisors and back office staff, working in separate offices or distributed teams.

## KEY BENEFITS



### 4-5 admin hours saved/user per week

"There are so many small items or details I don't have to follow up on because I can see they were handled!"



### Smarter and more efficient stand-ups

"Hubly enables us to have a much more high-level weekly team meeting, because we can come out of the weeds a little bit and talk about things that will help us grow!"



### No client reviews slipping through the cracks

"Last year I marked off a whole day on my calendar to review client meetings; now I have Hubly Insight Dashboards, and I can confidently know if anyone was missed in the calendar year in about 5 minutes."

# HUBLY

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