

# HOW MEGHAN'S TEAM OF 5 USES HUBLY TO FUNCTION LIKE A TEAM OF 10



**RIDGELINE**  
FINANCIAL PARTNERS

## MEET MEGHAN

Meghan Rutherford is the Managing Director of Operations at Ridgeline Financial Partners, a comprehensive financial planning and wealth management firm based in Avon, Connecticut. Meghan has 20-years of financial service experience and a diverse background from working in both small and large businesses. With her extensive experience, she understands the importance of providing a high-touch client experience and the challenges that come with it.

## THE CHALLENGE

The team at Ridgeline Financial Planning Partners is small in terms of numbers, but large in terms of assets and responsibilities. The small but mighty team of 5, two being financial planners, is responsible for an astounding amount of active clients -- 700 to be precise. This number didn't even include the additional 150 clients they were about to retain when they acquired a new firm in 2021. Beyond taking on a surplus of clients, they were also welcoming three additional team members. With this next stage of growth came increased responsibility and the need to get their home-base more organized.

Widely known for their stellar client experience, Ridgeline Financial Partners had to ensure that they could maintain their high-level client experience with this new surge of growth. However, without intuitive technology to efficiently document repeatable processes, track client progress, and train new team members, they risked having things fall through the cracks.

**"I had to try to ensure tasks were getting done and being documented. I felt the stress of this because I was the hub that everything was coming through and it wasn't sustainable."**

For years, Meghan's team had solely relied on a CRM and an "Excel spreadsheet matrix" to manage everything in their firm, from meeting preparation to annual RMDs. With no central hub to operate their business from, it became difficult to feel in control -- a problem that would only multiply with the addition of 150 new clients and three new team members.

**HUBLY**

## THE SOLUTION

Meghan came across Hubly when she watched the Redtail's Integration Announcement ([link video here](#)) and saw how Hubly tracked every piece of the advisory puzzle. She immediately thought, "this is the answer for us."

Hubly allowed Meghan to create tag groups for clients to provide different service models based on a variety of criteria, beyond typical ABCD segmentation, and identify clients that were not profitable for the business. Instead of trying to document everything for the firm in one chaotic spreadsheet matrix, Hubly allowed Meghan to organize work into projects. This enabled her and her team to efficiently work on the same project for multiple clients at once.

**"How much we are managing from an ongoing client service standpoint simply wouldn't be possible without Hubly."**

As the Managing Director of Operations, Meghan loved that she could see all overdue items for her entire team in just seconds. She was easily able to manage her team's workloads, see who was falling behind on client tasks, and proactively step in to provide support. Hubly went beyond the capabilities of a spreadsheet because it tracked project progress, clarified task details, set reminders, and allowed for task delegation.

Hub Feed

18

1

Erin ●●●●

Long

Topic: Tax Projection & Planning

Upcoming Reminder

- Consider Potential Actions

🔔 2 ☒ 2/6

LR

Devon ●●●●

Brown

In Progress

- Review Trust
- Review Healthcare Directives

☒ 3/7

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Amanda ●●●●

Brown

Overdue Reminder

- Determine Optimal Savings Strategy
- Update Plan

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HS

## THE RESULTS

As the firm expands, Meghan is now able to ensure the entire team is on the same page and that knows exactly what's in the pipeline for the next day, week, and year. With Hubly as their central hub, Ridgeline Financial's excel spreadsheet matrix has been retired and everything - past, present, and future - is tracked in Hubly.

- Reach a target milestone of \$500MM in AUM
- Continuously onboard 5-10 new clients per week
- Created tag groups to provide customized service models

HUBLY