HUBLY

HOW EFFICIENT EMPLOYEE ONBOARDING HELPED A FEE-ONLY PLANNER 4X HIS REVENUE IN TWO YEARS

WEALTH MODE
FINANCIAL PLANNING

MEET JUSTIN

Justin Chidester is the owner and principal advisor of Wealth Mode Financial Planning, a comprehensive, fee-only firm in Logan, Utah. Justin's focus is on matching young professionals and growing families with student loan repayment plans that help them plan for the future. His work has been featured in Forbes, the Huffington Post, MarketWatch and many more — and, like many of his clients, he's just getting started!

THE CHALLENGE

Like most of us, Justin's work changed considerably in early 2020. Already near capacity, he experienced a sudden influx of new clients looking to take advantage of student loan deferrals and related pandemic-era programs.

While he hadn't anticipated hiring additional team members right away, Justin quickly realized he would need to bring on more staff to manage demand without compromising the level of client care he offered.

> "When you have a service-based business, and you start to serve a lot of people, you hit a point where you cannot truly hold in your head everybody's lives. I found myself desperately needing a system that could help me manage a growing book of clients and provide a consistent value.

With an expanded team, however, came new challenges. Justin's biggest bottleneck became onboarding new hires, training and getting everyone up to speed quickly.

THE SOLUTION

Justin began laying the groundwork for this project much earlier in his career. Before founding Wealth Mode, Justin freelanced as a paraplanner, where he saw the value of having a structured, systematic method for onboarding new team members:

> (The advisor I worked for) had a good foundation of workflows. When I came into the CRM that she used, as I worked through those workflows for her, I was always thinking in terms of, 'how does this become easier next time? How do I make this more clear for somebody else?'

In other words, when it came time to grow his own practice, Justin knew what to prioritize, which led him to Hubly. With Hubly, Justin was able to build and implement a single source of truth where employees could turn for best practices and client information. Their workflows in Hubly now serve as both an employee manual and a training guide — one that can easily be revised as Wealth Mode Financial Planning grows.

With Hubly, Justin has been able to 'plug and play' new team members into existing processes with little to no manual onboarding — even employees with no prior industry experience.

THE RESULTS

As Wealth Mode Financial Planning continues to grow, Justin is now able to onboard staff with peace of mind. Hubly reduced his manual training requirements, while making sure new employees are up to speed with the administrative demands of a growing firm.

As he continues to grow his team, Justin will be able to record and document employee activity, gaining visibility into their roles and the impact they make in his firm.

- New staff with zero industry experience can do majority of data entry and administrative operations from day one
- Built-in quality control with Hubly ensures a consistent level of service to each client
- Justin and his team continue to deliver high-touch comprehensive planning, even as Wealth Mode's client base and revenue have doubled two years in a row