

Best Practice Principles for Tech Adoption in Advice Firms

Getting the full value from your technology investment

Adopting integrated tools represents an organisational evolution, but it doesn't require upheaval to implement. To maximise ROI in the long term, firms must align people, processes and technology around clear principles.



Start with Process Audit

Before implementing new systems, audit your current workflow.

Where are the delays today? Where do advisers waste time? The 61% of advisers who spend over 20% of client meeting time on data collection aren't the exception—they're the norm. Identify where manual handoffs and workarounds are creating bottlenecks, and those become your priority integration points.

Align Systems to Workflows, Not the Reverse

Technology should adapt to how your firm actually works, not force your people into rigid processes.

The best integrated systems provide flexibility while maintaining consistency—allowing advisers to work naturally while ensuring data quality and audit trail integrity.

Create Internal Champions

Technology adoption succeeds or fails based on people, not features. Identify early adopters who can become training champions and internal advocates. When their peers see real results—time saved, clients better served, stress reduced—adoption accelerates organically.

Track What Matters

Define success metrics before implementation:

- Time savings per client interaction
- Error reduction in data transfer and assumption-building
- Client capacity increase without quality degradation
- Compliance efficiency improvements
- Cost reduction across the advice process

These metrics make the business case undeniable and help focus ongoing optimization efforts.

Think Partnership, Not Vendor

The firms that extract maximum value from integrated platforms think long-term. They work with technology partners who understand the evolving advice landscape and invest in ongoing innovation. FE fundinfo's role extends beyond software provision we partner with firms to help them stay ahead of what's next in an industry undergoing rapid transformation.