



CARSON

## Advisor-First by Design. Enterprise-Ready by Results. Validated by Carson Group.



**CASE STUDY:** How Carson Group reclaimed advisor time, improved client engagement, and scaled smarter with structured data from Zocks.



### For Carson Group, efficiency isn't just a metric—it's a mission.

Known for its bold approach to scaling advisor success, Carson's leadership recognized a simple truth: **as firms grow, so too does the cost of inefficiency.** Notes scattered across systems, follow-ups delayed, client details lost in translation—these weren't just workflow issues; they were roadblocks to meaningful connection.

Carson knew they needed not just an app or another tool but a platform that would power deeper, more personalized engagement, structured intelligence, and real-time efficiency across their entire network of advisors. What they needed was a **purpose-built, privacy-first AI platform** that would free advisors to be fully present in every conversation, while still capturing the insight required to move relationships forward with intention and at scale.



#### CARSON'S CHALLENGE

### The Admin Avalanche

Carson's advisors were drowning in administrative tasks. The inefficiency and lack of transparency around client meetings was becoming a significant drag on productivity. Some advisors had resorted to inviting a third person to client meetings just to take notes—a costly and inefficient workaround. The firm needed a solution that could **intelligently capture meeting details, automate documentation, and seamlessly integrate with their Salesforce implementation**—all while maintaining the highest standards of privacy and compliance.



#### THE SOLUTION

### One Platform to Rule the Meeting

After evaluating several options including Microsoft Copilot, Zoom AI, and Jump, **Carson selected Zocks as their partner of choice.** Rather than just another app in their tech stack, Carson views Zocks as their "central meeting operating system"—a foundation they can plug other solutions into.

Zocks led the pack because of its **ease of implementation.** Advisors are busy. They need an easy button to get started—Zocks fit that bill. It's also built FOR financial advisors, so it knows how to transcribe the important items from a client meeting, but skip or smooth over irrelevant parts."

**Dani Fava** | Chief Strategy Officer, Carson Group





## IMPLEMENTATION

### 400 Advisors in 30 Days

The implementation process was remarkably smooth and quick. The platform integrates seamlessly with Carson's Salesforce environment across the entire client meeting lifecycle:

- 1 Before meetings:** Zocks pulls key data from Salesforce, including Household and Person Account information, along with insights from past meetings to generate tailored prep summaries.
- 2 During meetings:** Zocks silently captures transcripts, summarizes key points, and flags action items.
- 3 After meetings:** The platform automatically syncs meeting summaries as Events and takeaways as Tasks in Salesforce, assigning them to the right team members. Zocks also tracks, saves, and syncs client interests in Salesforce, improving the annual review process.



We had 400 advisors up and running within about a month. They required almost no training. **Zocks is incredibly intuitive.** I've been working with integrating systems for 15 years. Zocks has been, by far, the most moldable platform to integrate."

**Dani Fava** | Chief Strategy Officer, Carson Group



## THE RESULTS

### 8 Hours Saved. Per Week. Per Advisor.

Carson's advisors report saving an average of 8 hours per week. Zocks' ability to send clean, usable data to Salesforce without manual mapping or re-entry has saved over 9,000 hours in the first six months alone, resulting in \$2M+ ROI. Beyond efficiency gains, Carson has also seen a significant shift in advisor confidence. The successful implementation of Zocks has reinforced advisors' belief that Carson is committed to integrating cutting-edge technologies that help them grow their practices. **Most importantly, Zocks has transformed how advisors approach client meetings.**



Zocks is helping advisors be more present and engaged in meetings. They're paying attention to the client while Zocks is keeping tabs on follow-ups. **Advisors absolutely love Zocks. Most of them call it a 'game changer.'**"

**Dani Fava** | Chief Strategy Officer, Carson Group



## STRATEGIC VALUE

### Data that Drives Decisions

Carson is just beginning to tap into the strategic potential of Zocks and plans to leverage the platform's structured data to identify best practices across their advisor network. **For Carson, Zocks' fit with their long-term technology strategy is clear.** "Zocks' integratability and modularity is key to our technology strategy. We are automating workflows. We are porting data across platforms. We are serving up insights and opportunities to the advisor. Zocks is well positioned to support our vision." **Finally, would Carson recommend Zocks to another firm? The answer is unequivocal: "Absolutely."**