

# Case Study

IMPROV

**Trust, Time, & Tech:** How the Financial Architects Redefined Client Service

*The* FINANCIAL  
ARCHITECTS

## Overview

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The Financial Architects, Inc. (TFA) is a boutique U.S. firm specializing in legacy family planning and multigenerational wealth transfer for high-net-worth clients.

Initially using Process Street for checklist creation, they realized they needed expert help to transform disconnected lists into true operational automation.

In August 2023, Process Street referred TFA to Improvizations to redefine their Client Journey with scalable automation and strategic oversight.

## Challenges

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TFA had isolated checklists rather than integrated, automated processes.



Manual workflows consumed significant time in routine client servicing.



TFA lacked a centralized, transparent way to track improvements across the firm.



Client data was spread across systems, making it difficult to access reliably.

## Engagement

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We began by establishing a strategic foundation: confirming business objectives, gauging organizational readiness for change, and agreeing on a lean-process mindset.

- **Governance & Transparency:** Implemented a streamlined project-management system using Notion for documentation and Miro for visual process mapping, creating a single source of truth for all improvement initiatives.
- **Process Re-Engineering:** Built on and refined the Client Journey by expanding it to 20+ high-impact workflows, with a focus on reducing errors, standardizing data, and accelerating approvals.
- **Hyper-Automation:** Deployed 30+ Process Street automations and 100+ Power Automate flows to eliminate repetitive admin tasks, with AI integrated to handle calculations, document prep, and proactive client communication.



Only the best can improvize.

[www.improvizations.com](http://www.improvizations.com)

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## Outcomes



95% reduction in annuity review time

From 15–20 minutes down to just 45 seconds per client, freeing advisors to focus on high-value client conversations.



100+ Power Automate flows launched

Eliminating duplicate entry by syncing Salesforce data with internal systems, and enhancing consistency in meeting prep, documentation, and follow-up.



100+ repetitive tasks automated

Across the tech stack using Process Street and Power Automate, significantly reducing manual effort and error rates.



40 minutes saved per client

For routine monthly planning updates, now completed in 5 minutes instead of 45.

## Reviews

“Improvizations has gone above and beyond... Their personalized, creative solutions are tailored to our operations and goals. Their professionalism and genuine commitment are unparalleled.”  
— *Sydney Snyder, Office Manager*

“We can handle more clients and build intense personal relationships because the administrative work is off our plate.”  
— *Bill Gombert, Owner*

## Curious how this could work for you?

Reach out to Bryan deSilva,  
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970-396-7529

Learn more about our Process Services:  
<https://www.improvizations.com/process-services>



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