



SIDEDRAWER™

Case Study

Mallory McGrath of Viive Planning

Viive Planning's Mallory McGrath benefited significantly
from using SideDrawer

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We sat down with the Founder and CEO of Viive Planning, Mallory McGrath, to learn about how the implementation of SideDrawer has benefited her family-first, open dialogue communication approach to aging & end-of-life planning.



Who is Viive Planning?

Viive Planning exists to facilitate conversations around aging & end-of-life planning among families and loved ones. Viive reviews the whole project (the life of our client), helps them draw up a customized blueprint (their Aging & End-of-Life Plan) and then coordinates with their Trusted Partners to ensure a smooth process and the family's satisfaction.

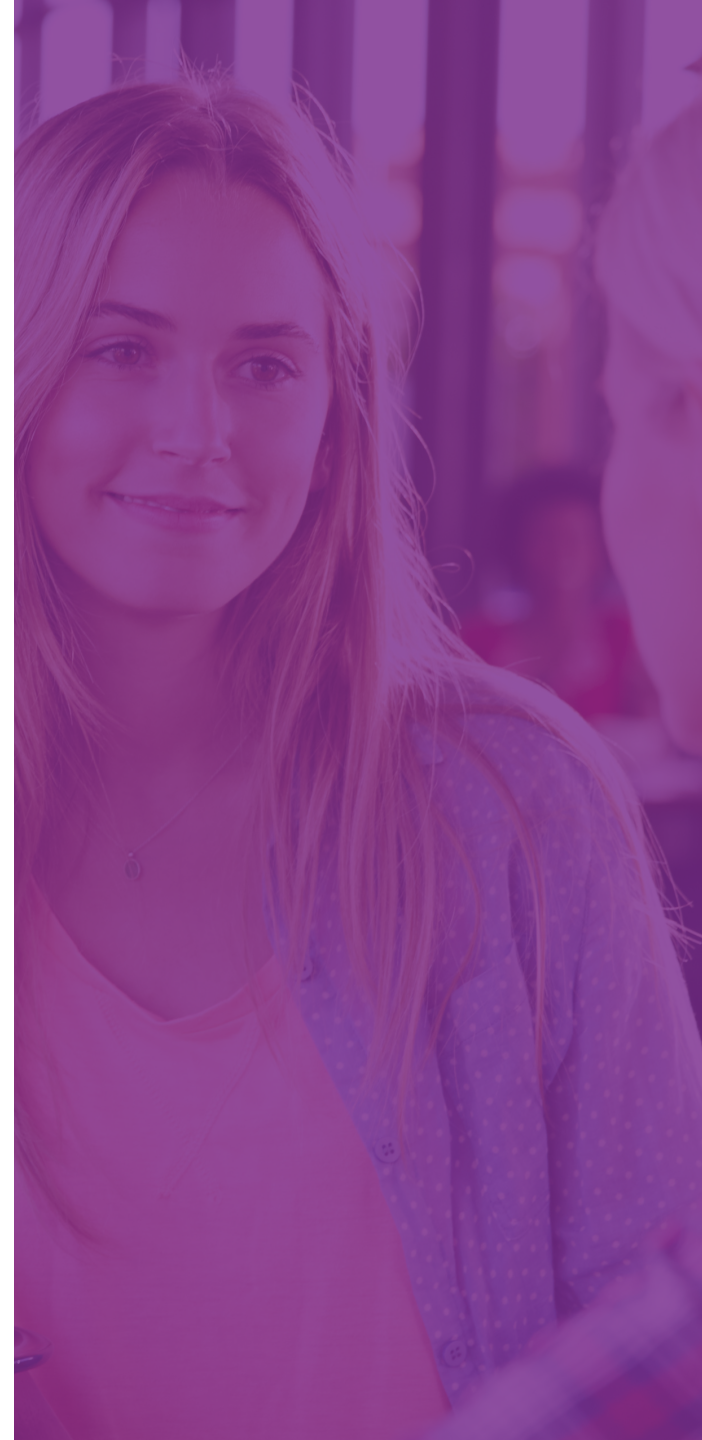
Mallory McGrath was an early adopter of SideDrawer, and her feedback has resulted in many positive changes around the features and functions of the platform. As the CEO of Viive Planning, Mallory's goal has been to create a new way to help families plan and implement their estate planning - going as far as describing it as "aging and end of life planning." This holistic approach has proven successful, and Viive Planning continues to attract new clients.

Viive Planning – The Challenge

The way that Mallory approaches aging and end of life planning involves addressing a lot of the difficult conversations and working with families to have those conversations in a healthy way.

With this holistic approach in mind, Mallory needed the type of document management platform that could safely and securely serve as the “middleman” between herself and her clients. Mallory specifically noted that she needed something to bring herself, the client, the adult children of the client, and her Trusted Partners together with ease and exceptional security.

This is where SideDrawer came in.





SideDrawer – The Solution

“We want to streamline the process, we want to take a lot of stress and strain and confusion away from clients both in planning and executing plans,” said Mallory, “And this is where SideDrawer came in for us. “I actually had a plan to build a platform similar to what SideDrawer has created, and then I learned about SideDrawer and happily scrapped that plan and stuck with them. It was the best decision for me and my business.”

This has worked out well for Mallory, as SideDrawer has become a major part of her business in the last year. It’s not just the improvement in security or ease of access that has benefited Mallory’s business, but also the speed at which she can help stressed or frightened clients in their time of need.

Seamless collaboration

“It is really key for my clients to understand that their family should be involved in this planning process.” said Mallory about her experiences using the product. “When the time comes, their family will have access to everything that they need through SideDrawer’s platform. An example would be if someone calls me and says ‘Mom is in the hospital and she has been deemed incapable.’ I can then ask for the doctors note proving that and provide the Power of Attorney with access to the relevant documents on SideDrawer for them to be able to then take on their new role effectively and efficiently. The same goes for when someone dies, I will already know who the executor is and once provided with a Death Certificate, I can give them access to their loved one’s SideDrawer account as well. All of this is only possible this swiftly because of SideDrawer. It takes me two clicks and I can share the documents appropriately. I don’t think there is any other opportunity like this for estate practitioners in Canada.”

Driving efficiency

Prior to using SideDrawer, Mallory used a popular file storage application Google Drive, linked to her business Gmail application. Aside from the security concern with file sharing links and sensitive documents that would be attached to email, implementing SideDrawer has resulted in an efficiency gain for her practice, and saved considerable time for her clients.

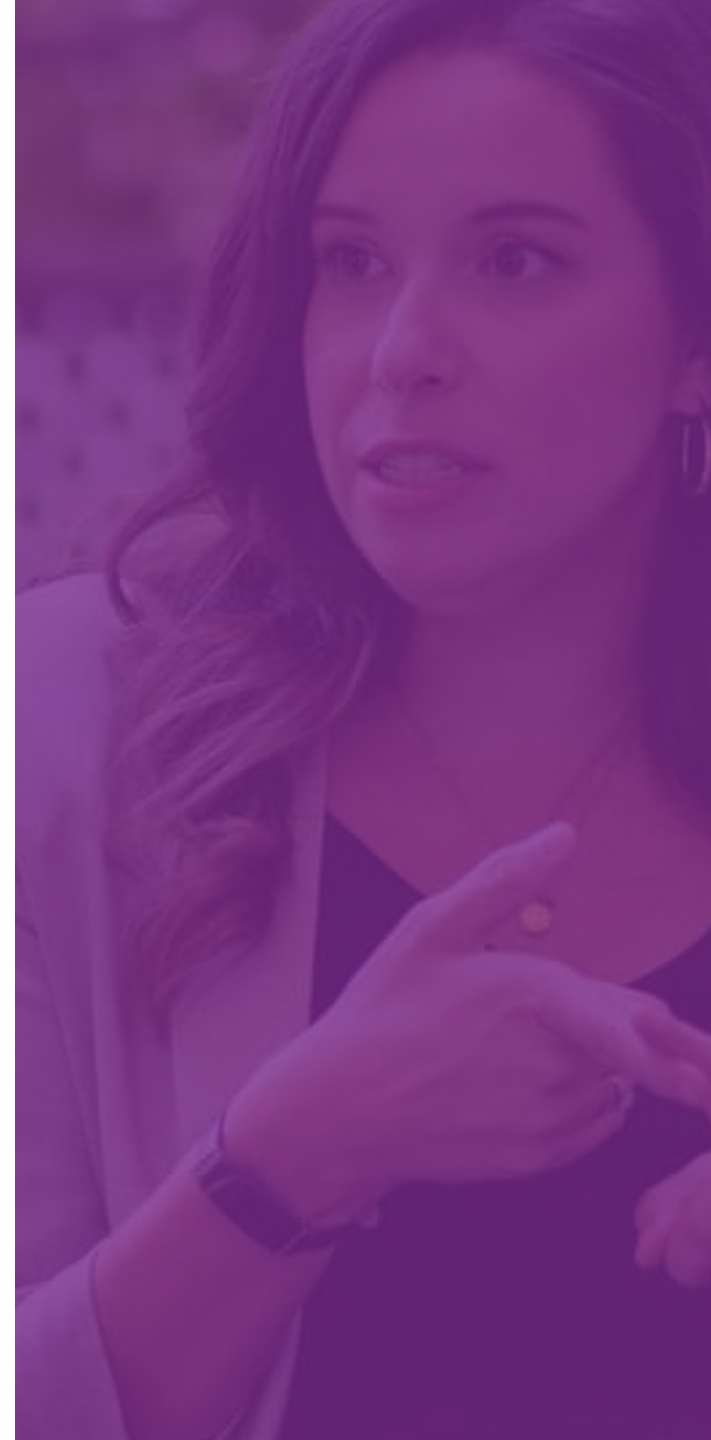
“The Info Requests actually helped a lot, I find that that’s a really efficient way for all the documents to get where I want them to be without the clients having to text or call me. They can actually self-manage the process, which has been a significant efficiency driver for my business, but also gives them the satisfaction that they are themselves involved, have ownership, and control. So that has actually probably saved my clients a lot of time and stress.”

Intuitive interface

Given the nature of Viive’s business, there can be a number of collaborators on any particular client file, between the family members, their own professionals and Viive’s Trusted Partners, which also means having users with various degrees of comfort with technology.

This is a major concern when evaluating any software – that you may now have to dedicate time to becoming a client’s ‘IT Support’, in addition to managing the business, attracting clients doing other necessary admin.

Thankfully the intuitive nature of the software and its user-friendliness has resulted in positive feedback and very little learning curves for clients, a significant relief for Mallory and her team.





Exceptional support

Just as well, Mallory cited the SideDrawer team's quickness to respond to technical support and customer service needs as a significant differentiator.

"The SideDrawer team are very quick about replying, or at least acknowledging, which is a big thing with me," said Mallory, "I think that when someone's busy, there should always be an acknowledgement. So, that for me has always been great, because then I can just move on with my life and make a note that this is happening/being resolved. So customer service has always been really exceptional."

SideDrawer's very proud to be part of Viive's solution in helping her clients and their family members have the important, but sometimes difficult conversations. Our collaboration capability and intuitive user experience are key to continued adoption, and we're encouraged by this unique use case for our product.



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What is SideDrawer?

SideDrawer is an all-in-one solution for financial advisors and individuals who want to take control of their document security. The SideDrawer platform is designed to mimic the traditional use of the physical filing cabinet with added security and organization benefits. SideDrawer is an extremely secure alternative to email and other unsecure measures that financial advisors will typically use to exchange sensitive documents with their clients. Thus, the ever-common problem with potential security breaches and hacking is significantly reduced.

Just as well, SideDrawer presents a unique opportunity for financial firms to improve overall efficiency by offering unique workflows, a better user experience, an all-in-one place for clients to store their digital documents, and the chance to solve virtually many of the problems that financial advisors and planners face in a digital world.

Ready to learn more about what SideDrawer can do for your business?

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