

Case Study:

How One Financial Adviser Transformed His Client Experience with Videosign

Customer Profile

Name: Paul Swan

Firm: Positive Solutions

Role: Independent Financial Adviser (IFA)

Industry Experience: 25+ years

Key Need: A smarter way to manage remote meetings, documents, and compliance

Introduction

Paul Swan has been delivering trusted financial advice to families and SMEs for over two decades. In a post-Covid world, his traditional ways of working weren't cutting it - especially when it came to remote meetings, managing compliance, and getting documents signed without hassle.

To provide the level of service his clients expect, Paul needed a more streamlined, integrated solution that wouldn't compromise professionalism or security.

The Challenge: A Fragmented Process

Before adopting Videosign, Paul's client meetings and admin workflow were spread across multiple tools.

The result? A clunky experience for both him and his clients:

- *"Do we use Teams or Zoom? Can the results be secure and recorded easily?"*
- *"Video conferencing platforms seem a bit generic since Covid... not specific enough to us."*
- *"We looked like we were jumping on the bandwagon."*

Common pain points included:

- Switching between video platforms and signing tools
- No clear integration with financial planning software
- A disjointed client experience that felt unprofessional

The Solution: A One-Stop Platform for Financial Advisers

After discovering Videosign, Paul quickly recognised the value of a tailored solution for financial services.

“Clients love using a system that is designed with the financial advice process in mind, and is secure.”

Key Features that Stood Out:

- Integrated with Xplan - *“I can now set up meetings and view signed documents, all within Xplan.”*
- Compliant signing and secure recordings – ideal for audits and peace of mind
- All-in-one solution - meetings, contracts, and transcription in a single platform

“User guides and tutorials made it easy for me to get started... I’d say it’s just as simple to use as other alternatives.”

The Results

Since adopting Videosign, Paul has experienced a noticeable transformation in his workflow and client relationships:

- **Less admin** - No more switching between tools
- **Improved compliance** - Everything is recorded and signed in a compliant way
- **Better client engagement** - Remote meetings now feel more professional and seamless
- **Faster turnaround times** - Documents are signed and returned faster
- **Greater flexibility** - *“I even use Videosign outside of Xplan for non-client meetings.”*
- **More time for client advice** - By reducing time spent on admin and chasing signatures, there is more time to spend with clients.

Conclusion: A Simpler, Smarter Way to Do Business

For Paul Swan, Videosign delivered exactly what he needed: a secure, integrated, and easy-to-use platform built with financial advisers in mind.

Why Financial Advisers Choose Videosign

- ✓ Fully integrated with Xplan (and intelliflo)
- ✓ Secure and Compliant by design
- ✓ Simple to use, with full onboarding support
- ✓ AI-ready for the future
- ✓ Clients feel confident and secure

Looking to Improve your Client Experience?

If you're a financial adviser looking to modernise how you meet, advise, and contract with clients, Videosign could be the perfect fit.

Book your demo today: <https://www.videosign.co.uk/request-a-demo/>

 www.videosign.co.uk
 enquiries@videosign.co.uk
 [videosignco](https://www.linkedin.com/company/videosignco)

