



RELEVATE

LIFT | RAISE | LIGHTEN

Case Study

Plutus – CRM | Automation |
Secure Data | Proposals



THE CHALLENGE

Plutus is a financial services firm specialising in self-managed super funds (SMSFs), with teams based in Australia, India, and the Philippines. Their processes relied heavily on spreadsheets for managing complex financial calculations and structuring client data. Staff would manually enter information across multiple sheets, then assemble proposals and compliance documents by hand. This approach was not only time-consuming but also error-prone, creating risks in an industry where accuracy and compliance are critical.

Plutus needed a system that could handle the sensitive, data-heavy nature of financial services while automating client onboarding, data collection, and proposal generation. The goal was to move beyond spreadsheets to a robust, secure platform that supported both their local and overseas teams.

THE SOLUTION

Relevate partnered with Plutus to design a bespoke financial services system within Zoho. At the heart of the build is Zoho CRM, customised to manage the entire client journey — from initial enquiry to ongoing reviews. The platform captures extensive financial data securely, with encryption applied where necessary, and feeds that data directly into branded proposal templates.

**Relevate is helping us
replace spreadsheets
with a secure,
automated platform.
Zoho gives us the
structure we need to
manage complex
financial data with
confidence.**

- Plutus

Automated mail merge functionality means proposals can now be generated and delivered to clients quickly and accurately. The system also supports fact-finding workflows, ensuring advisers gather all necessary financial information in a structured way before creating the final recommendations. With this foundation in place, Plutus will have a single source of truth for all client data, replacing the reliance on spreadsheets and enabling far greater efficiency.

THE OUTCOME

Plutus now has a secure central hub for client data, replacing their reliance on spreadsheets. Proposal generation has been automated through branded mail merge templates, reducing manual effort and improving accuracy. With the system about seventy percent complete, the business is already benefiting from structured workflows and greater efficiency. Once finalised, the platform will streamline fact-finding, annual reviews, and compliance, providing a scalable foundation for future growth.



**Financial
CRM**



**Secure
Data**



**Automated
Proposals**



**Client Journey
Management**

This project demonstrates how Relevate is helping Plutus transition from a spreadsheet-driven process to a purpose-built financial services platform. By embedding compliance, automation, and data security into a centralised Zoho system, Plutus is creating a scalable foundation that will transform client management and future-proof their operations.



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