



case study



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USING THE AVOCOR TO REVOLUTIONIZE THE CLIENT EXPERIENCE

As businesses all adapt to a hybrid and remote world, business, and very specifically financial planning, still move forward. Indiana-based reseller Ultimate Technologies Group has become a powerful resource for businesses looking to stay engaged with their clients and, specifically in the case of Ameriprise Advisors, tools that make a meeting as effective regardless if everyone is in the same meeting room or remote. UTG recommended Avocor's new Windows collaboration display by Avocor, which is the world's first and only interactive display to be Microsoft Teams certified.

Ameriprise Advisors the opportunity to have a meeting with hybrid or remote attendees that is as effective as a meeting with everyone sitting in the same room or in COO Len Grabovsky's executive office. That real-time annotation between advisor and client means that meetings can actually accomplish goals and move progress forward in real-time, which is critical for the dynamic financial sector. Grabovsky notes "The Avocor allows us to be able to have our clients be engaged. With the financial software that we use, for them to be able to really see, live, on a big screen versus a small screen, how we are able to impact their lives."



The WCD by Avocor is an ideal fit for Ameriprise Advisors. It's out-of-the-box ready for videoconferencing, with stereo speakers and built-in camera, both of which are tuned specifically to Microsoft Teams requirements. So Ultimate Technologies Group added an Intel NUC PC and that's all that Ameriprise needed to be up-and-running with interactive whiteboarding and to host a WebEx, Microsoft Teams or Zoom meeting.

Interactivity is a key component for Ameriprise Advisors – a simple "dumb display" did not have the features to solve their challenge. The ability to annotate right over the data so it's easily understood and shared was a paramount part of the checklist. And being able to have remote attendees be able to not only see the annotations but they can also annotate from their remote locations and all data can be saved provides

"Ameriprise - and UTG - love the all-in-one solution – camera, microphone and speakers with the whiteboarding. For us at UTG the InGlass touch and overall feel of the board was the big selling feature. We had tried many other interactive displays and the WCD from Avocor was unlike any other experience that we have had to date."

- Drew Burkholder, Ultimate Technologies Group