A Technology Tools for Today Exclusive:

A Sneak Peak at Junxure Essentials

By Joel Bruckenstein

Many existing Junxure CRM clients, as well as many potential Junxure CRM prospects have been patiently waiting for the arrival of Junxure's long anticipated cloud based CRM solution. Although the target date for the release of Junxure Essentials is still months away, development has progressed to the point where Greg Friedman felt comfortable enough to give us a peek at what his team has been working on. It is unusual for us to write about a product this early on, but we were motivated to do so by a number of factors. First, there is a great deal of interest on the part of readers in Junxure Essentials. Second, the firm has been very quiet about developments to date, so some were beginning to wonder if development had fallen behind schedule. It has not.

Friedman told me that his mandate for Junxure Essentials was to maintain the DNA of Junxure, but to develop a profoundly different version of Junxure. What does that mean? It means the firm wanted to take all the intellectual capital they've created with Junxure, add in all the feedback they've received over the years from users, and build a cloud based system from the ground up that reflects all that they have learned over the years. In addition, they wanted to build a system that was easier to use and more intuitive than the current Junxure product. According to Friedman: "No CRM developer has a better understanding of how advisors do business, how they work, and how they service clients than we do. Junxure Essentials will reflect that."

Let's look at a few examples of the new Junxure Essentials. One new concept that Essentials will introduce is the concept of the Workspace. There will be Workspaces designed around various tasks. These workspaces will in many cases replicate the functionality of Junxure wizards, but they will do so in a more intuitive fashion.

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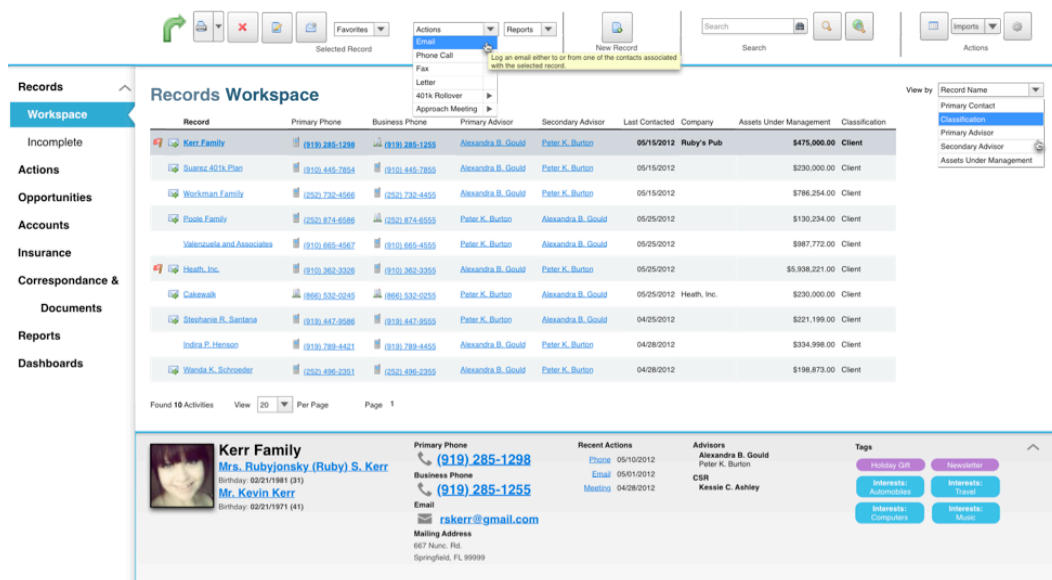
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Figure 1

In Figure 1, we see the Records workspace. The page is divided into four sections. On the left is the navigation bar, which takes us to other areas of the application. At the top of the screen is a toolbar that allows you to perform various functions on individual records, or groups of records. In the center we have the list of records itself, and on the bottom we see high level details related to the current record. There are a few items of interest here.

First, notice that many of the individual elements are underlined. These are all hotlinks. If you click on them, they take you somewhere else or perform an action. So, if you click on a name, the full record will appear. If you click on the phone number of the contact at the bottom of the screen, and if your telephone system is tied in to Junxure, it will place the call for you. If you click the email address, it will launch your email client and address an email to the contact. At the bottom right, the application displays tags. These replace keywords and other identifiers in Junxure CRM. Tags can represent an interest (automobiles, Travel, Computers, etc.), internal lists (holiday gift list, newsletter recipient), or whatever else you want. The tags can also be color coded for easier identification. In this example, the interests are coded blue, and the internals lists are violet.

To the left of this list is a dropdown menu that allows you to choose your view. The defaults include primary contact, classification and primary advisor, but the list can be customized. The same goes for the information displayed in the list. When a new advisor or firm logs on, there will be a default set of columns such as the one you see here in Figure 1, but the lists can be customized at the firm or the advisor level, and there is a wide selection of data that can be displayed in these columns.

At the top of the page you have the tools that allow you to perform various tasks on an individual record, or on a group of records. So, for example, if you have a group of records for IRA Rollover prospects, you could send an email or a letter to all of them from here. You can add a new record, import records, search records, and more.

Figure 2

Figure 2 displays a different view of the workspace from Figure 1. The difference here is that we've hidden the navigation pane, which provides more screen real estate to work with. It also provides a different toolbar view. It is not clear to us at this stage whether one, the other, or both will be included in the final version.

Junxure "actions" will be replaced by "tasks" in Junxure Essentials, even though they are still labeled actions here. The new tasks box, illustrated in Figure 3, is very different from the one in Junxure.

Figure 3

When creating a task, the high level contact information is displayed at the

top of the action box. Dropdown menus will allow users to quickly identify a task by type, category, and the person who initiated the task. You can also track the time spent on tasks for later analysis. At the bottom of the screen, icons can be used to perform common tasks such as create a note, letter, or meeting. Tags can be associated with tasks for quick identification and for search. The action summary, to the right on the screen, is new. Now, the system tracks all tasks that were created as a result of an initial task. The idea is you can track the flow of all the interrelated tasks from this page. So, if an initial phone call led to a meeting, which led to a letter, which led to an additional meeting, all of that would be displayed in the action summary section.

The final preview we have for you today is the one view of the detailed contact record (Figure 4); we expect that the final version will have multiple views.

Figure 4

In this view of the detailed client record, you can easily see all of the tasks that you've completed for a client in chronological order.

There are some other noteworthy items that we can't illustrate. Perhaps the more important one is a new, altered philosophy towards features. We've long maintained that Junxure is a feature rich program, but for new users, especially ones that are completely new to CRM, Junxure is overwhelming. Junxure Essentials will take a different approach: It will expose all the core features at the outset, but it will not display some of the more advanced features that novices are unlikely to use initially. As users become familiar with the system, administrators will be able to reveal and implement the advanced features. This should make it much easier for new users to become productive with Junxure Essentials.

In Figure 1, on the navigation bar, there is a link to Dashboards. A dashboard will be the default landing place when you launch the program, although you will be able bypass the dashboard if you choose to. The dashboard will contain a number of user selected tiles, or widgets, which will be miniaturized versions of pages similar to the one's we've displayed here. The idea is to give each user easy access to the functions they use most often.

There is a documents link. Junxure plans to have integration with one or more cloud document management systems at launch, with possibly more to follow. Friedman promises very tight MS Outlook integration for email. He says other email systems will be supported, but the level of integration may be different.

At this very early stage, it is too early to draw many conclusions about Junxure Essential because not all the functionality is built out, and because things are certain to change before the final release. Having said that, conceptually, we like the direction Junxure Essentials appears to be taking. The interface looks clean. Many functions will require fewer steps and less time than they do in the current version of Junxure. They are trying to expose more core functionality and make it transparent.

Ultimately, we'll have to wait for a full beta version to get a better idea of how it all works, but we've seen enough to have us anxious for more. We'll report back to you after we've had a chance to try out a near production version.