

Curo by Time4Advice

Customer Success Case Study



Curo Reduces Document Generation Time by Over 90%

Time4Advice is a Microsoft Dynamics CRM provider serving the UK financial services industry. The company delivers Curo, a CRM platform built specifically for financial advisers and their clients, enabling firms to manage client relationships, portfolios, regulatory processes and communications within a single, integrated system.

Curo supports the full adviser journey, from onboarding and reviews through to valuations and suitability reporting, providing firms with the tools they need to operate efficiently in a highly regulated environment. Its clients range from small advisory firms to large enterprises, all of whom depend on accurate data, compliant documentation and scalable processes to serve their end customers.

A core part of Curo's value proposition is delivering a powerful "out-of-the-box" experience that reduces reliance on fragmented add-on tools. Firms can operate confidently within one ecosystem, without managing multiple vendors or integrations.

Product

- Experlogix Document Automation

Benefits

- Reduced document generation time
- Multi-document generation in one action
- Consistent, compliant outputs
- Strengthened product differentiation
- Enterprise-scale performance

Tech

- Microsoft Dynamics 365 CRM

Challenge

As Curo's client base expanded, so did the scale and complexity of document requirements. Advisory firms relied on the platform to deliver timely, accurate, and compliant financial documentation. This included complex valuations and suitability reports that required aggregating hundreds of data points across accounts, plans, assets, and transaction histories.

At the same time, the broader market was leaning heavily on disconnected, bolt-on reporting and automation tools. This approach introduced unnecessary complexity, higher costs, and disjointed user experiences, challenges Curo was determined not to pass on to advisory firms.

Curo determined that delivering a better service at scale required a different approach. The objective was not simply to automate documents, but to do so in a way that strengthened the platform experience for every client.

Curo's strategic objectives were clear; deliver faster, more reliable client-facing documents while scaling document performance without compromising accuracy or compliance. Achieving this required embedding automation natively within the platform to preserve a seamless adviser experience, eliminating the need for additional vendors, integrations, or hidden costs. Just as importantly, Curo sought a partner capable of supporting long-term platform growth.

Solution

After careful evaluation, Curo selected Experlogix Smart Flows as its embedded document automation partner. Through this partnership, Curo has built deep internal expertise in the design, configuration and optimisation of Experlogix within the financial advice technology environment. The decision was based on performance, scalability and the ability to integrate seamlessly into the Microsoft Dynamics architecture underpinning Curo. Document automation would not sit alongside the CRM it would become part of it.

Deep Native Integration

Experlogix integrates directly within Curo's Dynamics framework, aligning naturally with existing data structures and workflows. Advisers and administrators generate documents directly from within the CRM, without switching systems or exporting data.

One-Click Document Generation

Using Smart Flows, Curo enables firms to trigger complex document generation with a single action. Large, multi-level datasets, including accounts, plans, assets and withdrawals, are filtered and assembled automatically into structured documents.



Scalable Workflow Automation

Curo also uses Smart Flows to design automated document workflows tailored to the needs of financial advice firms. Instead of generating documents individually, users can trigger a Flow that produces, packages and routes multiple documents in one step.

This capability increased document output per action by **6–8***, replacing repetitive one-at-a-time generation with streamlined automation.

HeadStart Document Suite

To accelerate client adoption, Curo has developed a standardised “HeadStart” document suite, designed and maintained by the Curo team using their expertise in Experlogix configuration and financial advice processes.

This suite includes approximately 25 templates covering key lifecycle stages from onboarding communications through to regulatory reporting and suitability documentation.

Delivered at go-live, these templates allow firms to begin operating immediately, typically meeting 80–90% of document requirements from day one with only branding or minor adjustments required.

By embedding both the technology and the document expertise within Curo, firms benefit from a mature, proven framework rather than needing to build document automation capability from scratch.



“Experlogix is miles ahead of others in regards to the Dynamics integration.”

Jay O'Donnell

Reporting Specialist

Result

The impact has been significant across Curo's client base.

90–93% Faster Document Generation

Generation times for complex reports reduced from 10–15 minutes to under 60 seconds, a 10–15× improvement in speed. This transformed document production from a potential bottleneck into a seamless, dependable process within daily workflows.

Production at Scale

Where firms previously triggered documents individually, Smart Flows enables 6–8 documents to be generated in a single action. This shift from sequential to scalable production unlocked substantial operational efficiency, particularly for larger firms running high-volume processes. Curo now supports approximately 40,000 documents per month across its client base, with individual firms generating over 23,000 documents in a single month – demonstrating consistent enterprise-level reliability.

Faster Time to Value

With the Curo-developed HeadStart document suite meeting 80–90% of document needs at implementation, firms experience immediate value at go-live. Customisation becomes refinement rather than reinvention.

Strengthened Platform Confidence

By embedding Experlogix directly within Curo – supported by Curo's own expertise in document automation design document generation has become a dependable, native capability within the platform. Clients trust that when their data is in Curo, they can generate accurate, compliant documents quickly and consistently.

Partnership Value

Curo's partnership with Experlogix represents a mature, long-term collaboration built around delivering scalable document automation for financial advice firms.

Want to learn more?

Speak with one of our experts.

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