



# Truepoint

For Truepoint’s new headquarters in Cincinnati, AVI-SPL created collaboration spaces that meet the company’s need for seamless interaction among team members and between clients and advisors.

## Engage Clients with a Personalized Experience

Wealth management company Truepoint has been growing its team to provide better client service. In the process, it was outgrowing its headquarters, where similar meeting rooms were beset with outdated technology. When leaders found a suitable new home — a blank slate they could tailor to their needs (and still in Cincinnati) — they wanted it to foster a seamless interactive experience between client and advisor.

“Our challenge was to figure out how we want to share ideas internally and how we can best collaborate digitally with our clients,” says Steve Condon, Truepoint president and principal. “That’s something our old space wasn’t set up to do.”

Truepoint specializes in financial advisory services like investment management, estate planning, and tax planning – all of which are enhanced by face-to-face interactions with clients. As this project got underway, the company was already emphasizing a personalized approach to its clients, one that

focuses on their life goals and how to achieve them.

That kind of approach would be enhanced with technology solutions that promote a collaborative environment for people gathering in the new headquarters and for those needing to participate from remote locations.

“It was important to us that our office space support daily collaboration and the personal relationships we form with clients,” says Condon.

## Create Collaboration Spaces that are Reliable and Easy to Use

At the project’s earliest stage, Truepoint completed an internal assessment of the kind of technology it wanted and the likely use cases for its employees and clients. Truepoint Technology Specialist Brad Felix describes the former space as “a jumble of different equipment” spread over two floors. The new home would bring its staff and

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guests together on one level. When company leadership entrusted AVI-SPL to be the advisor, decision maker, and integrator, they expected guidance about the type of solutions that would realize Truepoint's goals.

For us, this whole project has been about reducing the friction between our clients and our advisors when they're connecting virtually," says Felix, who adds that AVI-SPL distinguished itself with a vision that aligned with Truepoint's: Simplify its rooms, create consistent experiences, and make it easy for clients and employees to collaborate in those spaces.

"Our challenge was to shape their collaboration spaces with technology that's easy to use and reliable," says AVI-SPL Account Manager Steven Mason. "We had to first determine the UC platform that would be used to make calls and drive collaboration in the conference rooms."

Truepoint already had experience with Microsoft Teams and Zoom software tools at the desktop level. For the new headquarters, AVI-SPL and Truepoint agreed that Zoom would be the best UC platform to create meeting experiences across a variety of rooms that differ in size and intent: living-room-style areas (for relaxed conversations), traditional conference rooms, and client meeting spaces.

Upon the decision to go with Zoom, there was a lot of excitement about the options for designing Zoom Rooms to meet Truepoint's needs. Because of its all-in-one capabilities, Poly Trio was selected by both teams as the centerpiece of most spaces, the solution that would be used to launch the Zoom Rooms.

"The Trio conference phone combines a lot of the different features we were seeking," says Felix, noting the clean, intuitive touch interface and the attractive capabilities of its speaker, mic, and control functions.

Complementing these solutions are reliable Samsung displays, which show video conferencing participants and visual media. To meet the unique needs of different spaces, AVI-SPL recommended a combination of Poly

Studio and Crestron Flex soundbars. Poly Studio was implemented in the living-room-style areas, while Crestron Flex took its place in the more traditional, though highly flexible, conferencing spaces.

Collectively, the solutions deliver an experience that supports Truepoint's mission to meet each client's unique goals through integrated teams of specialists working on their behalf.

"We're a young, innovative firm that doesn't look like the rest of the industry," says Condon. "The design of the space really reflects our culture and personal relationship with our clients."

While the project's six-month timeframe would be a challenge to all involved, AVI-SPL helped Truepoint make its deadline and with the results it expected.

"What impressed me the most about AVI-SPL was how calm and collected they were," says Felix. "If there was an issue, they would troubleshoot it on the fly and make modifications. Overall it was just a great experience."

#### **New Energy in a New Office**

Felix says the company has seen a "huge productivity boost" since Truepoint moved into its new home. The combination of solutions and environment have created an experience that encourages team members to be forward-thinking and innovative, and to embody Truepoint values, like giving its clients personalized attention. The new collaboration tools are supporting that culture.

"Our clients and guests have been blown away," says Condon. "This is not what they typically expect from a financial advisory firm. This looks more like what they would want their home to look like: It's fresh, it's colorful, it's relaxed."

Employee reaction has been similarly positive.

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themselves have been welcomed by the team,” says Condon.

Before the move, staff struggled with finding rooms for meetings. Using the Crestron scheduling panels, they now quickly scan the office to see which rooms are available and then book their Zoom meetings.

“Crestron scheduling panels are a true plug-and-play solution when paired with the Zoom Rooms calendar,” says Mason. “And Zoom Rooms has been very easy to use – it just works.”

Within Truepoint’s collaboration spaces, its standardized solutions blend to facilitate seamless interaction with guests regardless of where they are located. They empower employees to easily video conference with clients so they can share advice, documents and presentations. And that ability has invigorated a team already dedicated to its company mission.

“My favorite part of the new office is the energy it’s created and seeing people enjoy the environment,” says Condon. “It’s made our daily lives easier.”

## At A Glance

### Organization

Truepoint

### Location

Cincinnati, OH

### Market

Enterprise

### Solutions

Crestron, Poly, Samsung, Zoom

### About AVI-SPL

AVI-SPL is a digital workplace services provider that works with organizations globally to improve their team collaboration and unlock new business value. We are the largest provider of collaboration technology solutions, which we deliver and support through our award-winning managed services. AVI-SPL experts design, deploy, manage and support AV and UC solutions that are standardized, simple to use, scalable, and serviceable. Improve your workplace experience and spark success with AVI-SPL

### Featured Partners





Fig 1.1



Fig 1.2



Fig 1.3



Fig 1.4

**Images**

Fig 1.1  
Truepoint uses the Zoom UC platform to create outstanding meeting experiences across a variety of rooms.

Fig 1.2  
Using the Crestron scheduling panels, Truepoint staff quickly see which rooms are available and then book their Zoom meetings.

Fig 1.3  
Poly Trio phones and Samsung displays combine to launch calls and show video conference participants.

Fig 1.4  
AVI-SPL met Truepoint's goal to simplify its rooms, create consistent experiences, and make it easy for clients and employees to collaborate in those spaces.