TODD to the Rescue
Elevating Financial Transparency

Blair Capital Management is a financial firm that needed help managing portfolios and improving outreach to potential clients. Their team was buried in spreadsheets, manual updates, and slow research cycles. They wanted better organization and faster results—without adding more people.

How Taliferro Group Enhanced Client Experience and Operational Efficiency Through Web Development and Data Integration: A Case Study

The Challenge

The Blair team was doing too much manually:

- Managing and updating client portfolios.

- Sending and tracking emails.

- Researching financial backgrounds on prospects.

Their existing tools weren't cutting it. Nothing was centralized, and simple tasks like following up or checking if a contact had responded were taking too long. They didn't need another CRM—they needed a system that could think ahead.

The Solution

They brought in TODD.

TODD isn't just a place to store data. It acts like a workforce that supports analysts and advisors. Once deployed, TODD helped Blair get organized, stay responsive, and automate what used to take hours.

Here's what changed:

1. **Centralized Portfolio Tracking** Instead of jumping between sheets and emails, TODD tracked all portfolio changes. Every time a client interaction happened, it was recorded and connected to the portfolio in real time. The team had one view of each client, complete with historical context.

2. **Smarter Outreach With NLP and Predictive Suggestions** The assistant wasn't just reactive. It learned from behavior. If a user typed "Who should I follow up with?", TODD didn't just show a list—it explained why those contacts were relevant and offered to take the user to that part of the app.

It also suggested questions as the user typed, guiding them to faster actions:

- "Who opened our last email?"

- "Show all prospects added this month."

3. Confirmation Before Action When a user typed "Update Alan's phone number to 404.555.1923," TODD showed a confirmation message: 💬 "Got it — you want to update Alan's phone number to 404.555.1923. Should I go ahead?"

No action was taken until the user confirmed. That helped eliminate mistakes, especially when working fast.

4. Vendor Research and Enrichment For financial partners and vendors, TODD enriched profiles with:

- Industry info.

- Public news mentions.

- Certification checks.

This helped Blair qualify leads faster without running separate searches.

5. Contact Management That Feels Human Blair didn't just want to log contacts. They wanted context. TODD tracked:

- Last outreach dates.

- Reply history.

- Email stages (e.g., intro, follow-up, no response).

When the assistant was asked, "When did we last hear from Latoya at Zenith?", it returned the exact date with a summary of communication.

Results Blair saved hours each week. They stopped second-guessing data, stopped chasing email threads, and started acting faster.

With TODD in place:

- Outreach became proactive.

- Client insights were instant.

- The team focused on strategy—not admin.

No new hires. No clunky tools. Just sharper execution across the board.

Final Thought

Blair didn't overhaul their business. They added TODD. It's like bringing in a full support team that never clocks out.