

	<a href="#"><u>*Wealthbox Premier</u></a>	Process Street	<a href="#"><u>*Hubly</u></a>
<b>General</b>			
Monthly Cost	\$65/mo. per user Includes cost of WB mail	\$30/mo. per member	\$500 onboarding fee + \$99/mo. per user
Initial Setup Process	Self-Onboarding	Self-Onboarding	Assisted Onboarding
Multi-Member Access	Yes	Yes	Yes
Mobile Application	iOS, Android	iOS, Android	No
User Interface	Moderate	Moderate	Complex
<b>Security</b>			
Admin Access Controls	Yes	Yes	Yes
Encryption	256 Bit Encryption	256 Bit Encryption	256 Bit Encryption End-to-End
2FA	Email, Text	Email, Text	Email, Text
<b>Workflow</b>			
Layout Type	List	List	Board
Task Descriptions	Plain Text	Plain Text, Rich Text, Widgets	Plain Text, HTML
Conditional Logic	Moderate	Robust	Limited
Dynamic Due Dates	Yes	Yes	No
Require Approval to Advance to Next Step	No	Yes	No
Add Custom Tasks to In-Process Workflow	Yes	No	Yes
Completion Time Estimate	No	No	Yes
Task Assignment	User Based	User Based, Role Based	User Based
Comments	Text Only	Text, Attachments	Text, Attachments
Attachments	Download Only	Upload, Download	Upload, Download
Guest Access	No	Yes	No
<b>Reporting &amp; Tracking</b>			
Reporting Capabilities	Robust	Robust	Moderate
Exporting Capabilities	Yes	Yes	Yes
Searching & Filtering	Yes	Yes	Yes
Emailed Daily Digest	Yes	Yes	No

# Workflow Software Comparison

Integrations			
Zapier Integration	Yes	Yes	Yes
Other Integrations	None (workflow-specific)	Salesforce, Google Sheets	Redtail, Wealthbox
G2 Rating			
Overall	4.5/5	4.6/5	Not Enough Data
Ease of Setup	8.9/10	8.9/10	Not Enough Data
Ease of Use	9.4/10	8.7/10	Not Enough Data
Quality of Support	9.1/10	9/10	Not Enough Data
Summary			
Best For Firm Size	Small	Any	Medium
Best Features	Simplicity and ability not to have to add additional software for current Wealthbox users.	Most comprehensive conditional logic settings and workflow template library.	A more robust version of Wealthbox's workflow feature. Ability to drag client cards between workflow stages.
Worst Drawbacks	Task descriptions are limited to plain text.	Inability to easily add one-off tasks.	Visual complexity and cost.
Outcome			
Wealthbox Premier	Wealthbox's built-in workflow features are sufficient for most users who prefer an all-in-one system. Both the Pro and Premier Plans include the Outcomes feature and the use of multiple Milestones. With email archiving, Zapier and Hubly integrations, users can implement practical automations to initiate, check off, and complete workflows without lifting a finger.		
Process Street	Users who prefer the most robust workflows possible will find Process Street to be both feature-rich and user-friendly. The application offers Zapier integration that can be used to initiate workflows when actions are performed in Redtail and Wealthbox.		
Hubly	Wealthbox or Redtail users who prefer a board-based system and want 2-way sync between their workflow software and their CRM will benefit from using Hubly. The team helps advisors onboard to the platform and provides thorough training. It's still a fairly new software with many updates and functions being added on a rolling basis.		

\* Note – ACP Vendor Partner discount offered.

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