

CONTINUAL EVOLUTION TO SERVE CLIENTS NEEDS: THE E-VALUATOR FORMULA

Kevin Miller, CEO/President, **The E-Valuator**, discusses his firm's prowess with *WealthBriefing*.



Kevin Miller
CEO/President, The E-Valuator

What sets you apart from your peers this year and why?

The continual evolution of our software to meet the ever-changing demands of the financial service industry. Our dedicated staff was, and still is, able to navigate covid related workflow disruptions and keep our product evolution on track. Client retention remained very strong through these covid times.

How have your colleagues contributed towards the success of your organization?

The organization's work schedule flexibility coupled with the team-oriented environment enables our team members to keep the workflow process intact while everyone deals with their own individual reality of distance learning, untimely illnesses, etc. The ability to work outside the normal 8-5 business hours and having other associates take on tasks outside their typical job description helps maintain production continuity and supports/builds a strong team environment.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

- Listen to the marketplace as to what will be needed in the future and adjust accordingly;
- Continually developing new features and field testing their application to the industry; and

- Maintaining an optimal operating system through use of the latest software enhancements while sustaining a current look/feel of the software to the end user.

What have been the challenges you have had to overcome to reach such a standard?

- In the near-term, the most obvious challenge has been the impact of covid and managing through the personal demands this has brought to our organization.
- While change can generate opportunity, it can also temporarily impede the longer-term development when industry changes require re-focusing from the task-at-hand to respond to the newly implemented regulatory requirements.
- Tracking that our development based on the anticipated future needs of our industry stays in-line with the actual direction of the financial service industry.

How has your business and business model reacted to the pandemic?

The pandemic has forced all of us to adjust our work schedules and workflow. Thankfully, being a software-based product, we were able to transition into remote work environments rather seamlessly.

Morale has stayed strong primarily due to the fact that we all understand that we are on the same team and all of us have needed a fellow associate to step-in and briefly assist on the project. This teamwork builds and sustains morale, and develops a synergy from which a small company can leverage into greater growth

Have your differentiators become more important to your business? Are they still relevant?

Differentiators are the most important attribute to a software, along with providing a solution to a problem and ease of use. The longer a software is on the market the more likely that software's differentiator can be duplicated in a modified manner by competitors. This requires the never-ending evolution of product development to stay

ahead of the market place "copycats" to maintain a discernable distance between where we are with product development and where we are going.

Whom do you look to for inspiration?

Given the massively competitive space The E-Valuator exists within, it's hard not to look at our competition for inspiration. Technological progression seems to be increasing at a faster and faster rate every year, and for us to stay on top, we need to innovate quicker and more creatively. Without this rigorous competition, it's hard to say whether The E-Valuator would be what it is today. With more competition entering the investment world all the time, we're constantly inspired and encouraged to keep progressing and evolving our software.

What do you hope will be the result of receiving this accolade?

Given the broad umbrella that Client Lifecycle Management and Client Marketing and Prospecting covers, winning these categories encapsulates many areas of our software that we've worked so hard to develop. Not only does it show that we've achieved the goals we've set for ourselves, but it also shows that we're headed in the right direction.

This software has been an ever-evolving project from day one, and these awards motivate us to continue innovating and implementing. What started as an investment analytics software has evolved into a much more robust tool than we originally envisioned, and we're excited to see how our further development can touch on other aspects of investment innovation. These accolades encourage us to keep pushing forward to see what else this software can develop into. ■

