



WorkPool

About us

WorkPool operates out of Cape Town South Africa and offers a full WorkPool deployment service throughout South Africa, this to all sizes of financial service providers, be that a small one to ten man practice, through to a practice of almost two hundred employees.

Launched in 2001, WorkPool is now used by some of the largest financial services brands in South Africa including, but not limited to, Deloitte, Moore Stephens, Grant Thornton, Barnard Jacobs Mellet, Sanlam and Discovery Distribution Services as well as many independent financial advisers practices who operate in the wealth management space through to multi-disciplinary practices offering the full spectrum of financial services.

WorkPool is owned, operated and managed by Gary Geddis and Marius Botha who are both intimately involved in the ongoing development, sales and marketing of the WorkPool Solution.

Within the IFA space we also make use of WorkPool consultants that are CFP qualified and have an intimate understating of the practices needs.

Value proposition

WorkPool offers a world class practice management system, where all resources collaborate within one business system managing all service delivery within the practice. WorkPool increases operational ability, drives productivity and reduces business risk.

WorkPool offers a 'one client view' on all business communications with your client, making it possible to offer real time feedback to a client on all work in progress including historic task regardless who last updated the record. Whether it is an email, an SMS, a task, an activity, a file note or a document you are looking for, WorkPool will ensure that you never misplace another record ever again.

WorkPool offers a highly configurable database, task and activity management, work-flow, integrated email and SMS, version control of documents and CRM capacities including bulk email and SMS marketing to profiled group of clients. You can elect a fully maintained cloud solution or a standalone server within your own environment. Being browser based, WorkPool is accessible anywhere anytime with remote compliance features.

Services or products offered

WorkPool offers

1. The WorkPool Solution – that can be deployed in one of two styles:
 - 1.1 A hosted or cloud solution where the IFA does not have to worry about supplying and maintaining hardware or software in the practice. In this case WorkPool also offers a backup service and take full responsibility for both hardware and software upgrades.
 - 1.2 Or a traditional deployment where a client provides an appropriate server and a remote install can be performed by WorkPool. In this case the IFA could elect to place the server in their own office or again host their own server with an internet service provider.
2. Ongoing training and mentoring service.
3. SMS service provider with reply path.

Key individual

Gary Geddis (sales and marketing director for WorkPool)
Marius Botha (developer and systems architect)

Contact person

Gary Geddis

Contact details

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Regions supported

All of South Africa

Quote reference and pricing

To qualify for the preferred rate or service enhancement, please quote the following reference.

Quote reference: Allan Gray Adviser Services

Pricing: WorkPool offers Allan Gray Adviser Services members an ongoing discount of 10% on the subscriber agreement.

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