

From a One-Office Financial Practice to a Multi-Channel Wealth Advisory

Client: Birju Acharya CFP CWM (birjuacharyacfp.com) · **Founder:** Birjubhai Kiritbhai Acharya · **Industry:** Certified Financial Planning & Wealth Management, Ahmedabad

2021 PARTNER SINCE	6 FIIBIX PRACTICE AREAS ENGAGED	4 FLAGSHIP LOCAL EVENTS DELIVERED	Website + App + SEARCH & SOCIAL PRESENCE BUILT
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The Starting Point

Birju Acharya CFP CWM was, and remains, a genuinely established financial planning practice, twenty years of experience, a trusted Ahmedabad office, and a loyal client base built the traditional way, in person, one relationship at a time. But the operation behind that trust was still entirely manual. Leads were tracked by memory and paper, not by any system, and there was no structured process connecting a first conversation to a managed client relationship.

In 2021, Birjubhai connected with Fiibix to talk through streamlining that process with a CRM. What started as a single conversation about software became a multi-year, multi-phase partnership.

The Journey



The Approach

Fiibix started where every durable engagement should, with structure, not software. Before a CRM could mean anything, the business itself needed a real structure to organize around, so Business Consulting and Operations Consulting came first, mapping the actual flow of a client relationship from first inquiry through ongoing advisory. Recruitment followed directly from that structure, hiring built around the roles the new process actually required, not the roles that happened to be open.

Fiibix also worked on Financial Planning from the inside, advising Birju Acharya CFP CWM on its own business expenses and marketing cash flow, a financial planner's practice needing the same rigor the firm brings to its own clients.

Built for the Clients Most Worth Reaching

With the structure and team in place, the engagement moved outward. Fiibix ran four flagship local events for Birju Acharya CFP CWM, giving the firm real mileage and visibility in the Ahmedabad market beyond word of mouth alone. Technology Consulting followed, giving clients a way to reach the firm through a proper website, a mobile application, Google search, and social media, channels a twenty-year practice built on in-person trust hadn't needed before, but couldn't keep growing without.

Internally, staff now run leads and call records through the CRM Fiibix originally set out to help implement back in 2021, the single system that made every phase after it possible to manage. On top of that operational base, Fiibix built marketing strategies aimed at two goals at once, generating more from the relationships the firm already had, and reaching new ones. Some of the strongest campaigns were also the most deliberately human, built around real emotional resonance rather than product features, aimed specifically at the doctors and high-net-worth families who most need a wealth manager they can trust with a growing legacy.

What Changed

◆ From manual, memory-based lead tracking to a structured CRM covering leads and call records	◆ A formal company structure , with recruitment built around it, not around open headcount
◆ 4 flagship local events delivering real market mileage in Ahmedabad	◆ A full digital presence , website, mobile app, Google search, and social media
◆ Business-side financial planning applied to the firm's own expenses and marketing cash flow	◆ Emotionally-led campaigns built specifically to reach doctors and high-net-worth families

Practice Areas Involved

Business Structuring & Advisory

Operations Consulting

Recruitment & Talent Solutions

Financial Planning & Advisory

Marketing Strategy & Brand Growth

Technology Consulting

 **On images:** this document intentionally uses no fabricated photos of events, staff, or clients. For the published version, pull real photography from the 4 local events, the Birju Acharya CFP CWM office in Ahmedabad, and the firm's own Facebook (@BirjuAcharyaCFP) and Instagram (@birjuacharya), real event and team photos will carry far more weight with prospective clients than any generic stock image.

Ready for Your Own Case Study?

If your business needs the structure to match how far you've already come, that's exactly the conversation a free consultation is for.