

CLIENT CASESTUDY

■ Financial Services

Newcleus Builds a Scalable Service Model with HighGear

Newcleus, LLC connects specialized teams, improves visibility into client work, and reduces daily coordination meetings from 30 minutes to 10 minutes.

Introduction

Newcleus designs and implements compensation, executive benefit, and investment strategies for financial institutions and other corporations. As client work became more complex, the company restructured its operations into three specialized divisions. HighGear gave those teams a shared system for managing handoffs, tracking progress, and coordinating delivery.

■ Results at a Glance

- ▶ Three-month implementation from February to May 2024
- ▶ Daily coordination meetings reduced from 30 minutes to 10 minutes
- ▶ About a week of repeat work avoided on one client project
- ▶ Greater capacity to manage growth and complexity, according to Newcleus leadership

A New Service Model Needed a Shared System

Before HighGear, individual employees worked with specific advisors and managed their requests from beginning to end. Each person relied on their own mix of spreadsheets, Outlook tasks, emails, and notes. Experienced employees knew how to get the work done, but leadership had limited visibility into progress, workload, or turnaround times.

Getting a status update often meant sending follow-up emails or bringing people together. Gathering business analytics required pulling information from multiple sources, with uncertainty about its accuracy.

Newcleus responded to changing market demands by dividing responsibilities among specialized teams. Work would now move between departments, making reliable handoffs and shared visibility essential.

HighGear provided the structure to support that change. Teams could see where work stood, which tasks remained, and who needed to act next. Kamel Boulos, Newcleus's CTO at the time of the interview, described HighGear as the "conveyor belt" connecting the new service model.

Live In Three Months and Refined By The People Using It

Newcleus wanted a platform it could configure quickly and adapt internally. Although the company had technical expertise, it wanted to avoid having to write code every time a process needed to change. The team also



"The way that we operated before, everyone working in their silos just didn't work anymore."

Brian McCracken
SVP, Director of Administration, Newcleus

valued access to knowledgeable support throughout implementation and ongoing use.

Implementation began in February 2024, and Newcleus went live in May. The three-month launch was faster than the six-to-twelve-month timeline Boulos had initially anticipated. The team started with critical processes and continued refining the system after launch.

Employee feedback shaped those refinements. McCracken and Boulos held weekly meetings and screen shares to see how employees used HighGear, identify missing functionality, and adjust views and processes. As employees became comfortable with the platform, they began requesting improvements themselves.

Less Time Coordinating and Faster Answers for Clients

HighGear became the center of the analyst team's daily coordination meeting. Six participants could review current tasks, new deliverables, and priorities together, including colleagues working remotely. With the work visible in one place, meetings that previously took approximately 30 minutes could be completed in 10 minutes.

That visibility also changed how leadership responded to clients. After one client meeting, Boulos returned to his desk, opened HighGear, and checked the status of the deliverables they had discussed. He sent the client an update before they returned to their office. Previously, he would have needed to gather the team to find those answers.

Client Testimonial

"We're able to see everything that was scattered before."

Brian McCracken
SVP, Director of Administration, Newcleus

Work History that Prevents Repeated Effort

For Data Analyst Zach Brennan, access to prior communications and deliverables made it easier to take over work when colleagues were away. He could review the project's history, understand earlier decisions, and continue without reconstructing the work through separate conversations.

On one long-running client project, Brennan and a colleague considered an approach and checked earlier

revisions before proceeding. They discovered that the team had already explored the idea. Brennan estimated that this avoided about a week of repeat work, including contacting insurance carriers and creating benefit designs.

The same visibility helped Brennan learn the business when he joined Newcleus. Reviewing previous tasks and exchanges between departments gave him practical examples of the terminology, client requirements, and steps involved in delivering the work.

Better Visibility to Manage Growth

HighGear gave Newcleus a clearer picture of the work moving through the business. Leadership could track task and process turnaround times, completed work by individual or department, and workload distribution. McCracken could see when someone needed help and shift resources accordingly.

That information also strengthened reporting. Rather than repeatedly assembling data from separate sources, the team could use a more consistent set of metrics for executive and board discussions. Visibility into the types of deliverables being requested helped Newcleus understand changing demand and decide where to focus its efforts.

Boulos credited the combination of the new service model and HighGear with helping Newcleus handle more transactions and greater complexity without adding staff. He also reported an increase in revenue per employee. For Newcleus, the benefit was a more scalable way to organize and deliver client work.

A Foundation for Continued Improvement

Newcleus has already made changes to HighGear internally, supported by a team it can turn to for guidance. That ownership gives the company a way to keep adjusting its processes as business needs evolve.

Its next planned phase includes connecting HighGear with its CRM and proprietary reporting and data system, automating additional manual tasks, and extending use into other business functions. These initiatives remain planned. The foundation is already in place: shared visibility, coordinated handoffs, and an internal team that can continue improving how work gets done.



“HighGear was really the backbone that helped us be able to transform the organization, change our service model and scale without necessarily having to add additional resources.”

Kamel Boulos, CTO at the time of the interview, Newcleus



Visual Workflow for Highly Regulated Industries

HighGear is the leading, intuitive no-code platform for business analysts to rapidly build enterprise-grade workflow applications. Businesses in regulated industries rely on HighGear to create custom workflow applications that easily drive adoption within their lines of business, instead of being forced to adapt to pre-built software or adding to the IT backlog for homegrown solutions. The world's leading companies depend on HighGear to manage work, improve visibility, streamline operations, meet compliance requirements and achieve digital transformation. ***Your workflow awaits.***

Scan to Watch Newcleus' Success Story



Watch Video