BIG SKY AI FORUM

From Time Saved to Time Optimized: How JUMP Is Using Conversational Intelligence to Move Beyond Productivity to Performance

Jump

Introduction

In October 2025, the Big Sky AI Forum, presented by Digital Wealth News™ and AI & Finance™, convened in Bozeman, Montana, bringing together leading innovators in financial services to explore how artificial intelligence is redefining advisory growth, compliance, and client experience.
This whitepaper, featuring thought leadership from JUMP, examines how conversational intelligence is helping advisors move beyond productivity, transforming reclaimed time into stronger relationships, smarter decisions, and measurable growth.

For decades, advisors have faced a time crisis: too much work, too little time. JUMP began by solving that problem, using AI to automate meeting preparation, notes, and follow-up so advisors could reclaim hours every week. Now, the focus has shifted from saving time to optimizing it—using AI-driven conversational insights to help advisors communicate more effectively and achieve better outcomes in every conversation.

By combining generative AI, conversational data, and industry context, JUMP helps advisors spend more time with clients and make every meeting more meaningful and effective.

LIAM HANLON

Head of Insights at Jump | AI for Financial Advisors

Liam Hanlon leads the team that analyzes over one million advisor-client conversations annually to extract behavioral and predictive insights that drive advisor performance, client outcomes, and firm strategy. Liam translates conversational patterns into actionable intelligence and partners closely with product and design to embed insights directly into the Jump advisor experience. Prior to Jump, Liam spent seven years at EY in the Wealth and Asset Management Business Consulting practice, where he focused on designing and conducting experiments on financial products and services to improve key business outcomes.

TABLE OF CONTENTS

The Advisor Time Crisis	3
Reclaiming Time, Reclaiming Value	3
The Next Frontier: Conversational Intelligence	3
Education. Insight. Action.	4
Advisor Playbooks: From Data to Dialogue	4
Firm-Level Intelligence: Turning Conversations into Organizational Insight	5
The Future of Advisor Intelligence	6

The Advisor Time Crisis

For decades, financial advisors have faced a persistent constraint: time.

Across the industry, advisors report spending the majority of their week on administrative and maintenance tasks, leaving only about 17% of their time for client meetings. The result is a chronic imbalance between operational effort and client impact.

JUMP was built to solve that imbalance. The question they asked was simple: How can we use AI to help advisors reclaim time and reinvest it in what matters most, clients?

> ***"Our original question was simple: how can we use AI to help advisors save time? Today, that question has evolved to how can we use AI to help advisors succeed more in the time we've already helped them reclaim?" — Liam Hanlon, Head of Insights, JUMP***

Reclaiming Time, Reclaiming Value

JUMP's original mission was to cut meeting administration time by 90% while simultaneously elevating both the client and advisor experience. And to a large degree, they have succeeded.

Today, over 19,000 advisors use JUMP technology. 60% of them save more than one hour per day, or roughly 300 hours per year, time they can redirect toward deeper engagement and strategic planning.

When asked how they're using that reclaimed time, more than 80% of advisors report spending it on revenue-generating activities. Half say they deliver more client service, and 48% conduct more client meetings.

This marks a fundamental shift: from efficiency for its own sake to effectiveness, from saving time to making time matter.

The Next Frontier: Conversational Intelligence

Having helped advisors reclaim hours, JUMP believes the next question is clear: How can AI help Advisors succeed more in the time they've reclaimed?

The answer lies in conversational intelligence, a discipline that analyzes voice or text communications using AI to uncover insights that improve advisor performance and client outcomes.

Traditional wealth management analytics have focused on what to recommend, the right product for the right person at the right time. Conversational intelligence adds the missing layer: how to position that recommendation effectively in conversation.

> ***“When you understand how your conversations perform, you can start designing them for success.”***
> ***— Liam Hanlon, Head of Insights, JUMP***

Education. Insight. Action.

JUMP’s approach to conversational intelligence is built around a three-part framework that turns every advisor interaction into an opportunity for growth.

1. Education
For the first time, advisors can access playback data that was previously invisible. JUMP surfaces metrics such as how long advisors speak versus listen, creating a feedback loop that reveals communication dynamics once left to intuition.

2. Insight
Data alone isn’t enough. JUMP analyzes these interactions to identify what actually drives results. For example, advisors with balanced talk times between 40% and 60% consistently show the highest client satisfaction and acceptance rates when presenting solutions.

3. Action
Finally, JUMP bridges the gap between awareness and behavior. The platform uses real-time nudges to help advisors adjust their approach, prompting them to listen more, probe deeper, or simplify explanations, guiding them toward the conversational “green zone” that leads to the best outcomes.

Advisor Playbooks: From Data to Dialogue

JUMP is using conversational intelligence to build dynamic playbooks for advisors, real-time guides for what to say, how to say it, and when. These playbooks distill millions of advisor-client interactions into specific, evidence-based patterns that improve the likelihood of success in critical conversations.

For example, when an advisor wants to motivate a client to begin an estate plan, JUMP analyzes historical outcomes to determine which conversational approaches work best. Should the advisor ask more open-ended questions? Should they frame the plan as protection rather than planning? Should they emphasize family continuity or tax efficiency first?

Each insight becomes a concrete behavioral recommendation, showing advisors not just what to recommend, but how to communicate it effectively.

JUMP’s initial focus areas are the moments that most directly impact client decisions:

•Prospect-to-client conversion
•Referral generation and conversion
•Financial plan creation and follow-through

In short, any interaction where a client or prospect faces a meaningful decision is a candidate for JUMP's playbook engine. These are the conversations where words truly shape outcomes, and where intelligence can make every advisor more effective.

Firm-Level Intelligence: Turning Conversations into Organizational Insight

Conversational intelligence isn't just transformative for individual advisors. It's redefining firm leadership and performance management.

At the firm level, JUMP's technology delivers two game-changing advantages.

1. A real-time pulse on the business.
Firms can now detect emerging trends directly from advisor-client conversations. Which products are gaining traction? Which topics are dominating client interest? Rather than relying on delayed reports or surveys, leaders gain immediate visibility into market sentiment as it unfolds.

2. A new foundation for practice management.
Historically, advisor success has been measured by output, revenue, AUM growth, or client acquisition. But those are lagging indicators. Conversational intelligence exposes the inputs that drive those outcomes: active listening, tone balance, question ratio, and emotional resonance.

For the first time, firms can see the behaviors behind performance and coach accordingly. Instead of telling advisors to "sell more," leaders can identify why some are excelling and how others can close the gap.

In this way, conversational intelligence becomes a practice management superpower, a mirror reflecting not just results, but the human behaviors that create them.

> ***"We've spent decades measuring outputs like revenue. Conversational intelligence finally measures the inputs that create it." — Liam Hanlon, Head of Insights, JUMP***

The Future of Advisor Intelligence

JUMP imagines a future where every advisor performs at their highest potential, with personalized, AI-driven coaching woven into their daily workflows.

In that world, conversational intelligence doesn't replace human intuition, it amplifies it. Advisors receive tailored feedback after key interactions, continuous learning loops based on real outcomes, and contextual guidance designed to help them grow.

Becoming a next-generation advisor means adopting AI not just for efficiency, but for effectiveness, using it to sharpen judgment, empathy, and communication.

JUMP's vision is simple: a profession where every advisor has a digital partner that listens, learns, and helps them show up as their best self in every conversation.

The future of wealth management won't be defined by automation, but by augmentation, technology that empowers human intelligence to reach new heights.

Watch the pre-Forum interview with Liam Hanlon: https://www.youtube.com/watch?v=PvZMT_fAEwA

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