

CASE STUDY

Fusco Financial Associates

"Our team evaluated a variety of document management solutions. We found that Treeno Software was the best fit for a mid-sized organization. Treeno's customizable software provided the flexibility and customer support we needed to operate more efficiently and effectively."

Tony Fusco
Branch Manager and Registered Principal

FUSCO FINANCIAL ASSOCIATES, INC.

Since 1986, Fusco Financial has been committed to serving clients with a high level of personal service and a disciplined approach to managing and preserving wealth. Fusco Financial has established a reputation for excellence by offering carefully considered financial guidance to individuals, business owners, professionals, organizations and corporate retirement plans throughout Baltimore and beyond.

Industry
Financial

Website
fuscofinancial.com

The Challenge

As an established and still growing independent practice of a well-known national investment adviser and broker-dealer, Fusco Financial Associates, Inc. ("Fusco") needed a solution that would allow them to create and improve efficiencies. Growth in clients and accounts served meant that staff was spending hours each week filing and handling paper documents and related administrative tasks. On occasion, documents would be misfiled, creating an additional resource drain. The organization felt that moving to a virtual paperless office solution would enable them to be more efficient both from a time standpoint, and from the resources needed to print, file, retrieve and work with paper client files.

The Situation

Fusco looked into several different document management and workflow solutions. Some of the products they reviewed were designed with large enterprises in mind; others seemed to be designed with a very narrow focus on small practices. Fusco was ultimately looking for a solution designed with the needs of mid-sized financial services organizations in mind.

As the Fusco team compared solutions available in the marketplace, they evaluated each on the following criteria:

- Client service and client experience
- Ease (or difficulty) using the platform's interface
- Cost
- Ability to customize the interface



The Solution

Treeno Software's ("Treeno") document management software was the obvious choice for Fusco for several reasons.

First, the Fusco team felt comfortable knowing that if they needed help at any point, Treeno could provide that support. Fusco was also impressed with how easy and accessible the interface was. Users found it self-explanatory and user-friendly. The ability to barcode documents made the process simple and intuitive. While different people on Fusco's team use the system to meet different needs, users across the board were able to navigate with ease.

The price point was also right, coming in at a level Fusco felt was reasonable for the value provided. Finally, the ability to customize Treeno's basic interface meant Fusco could tailor the product to truly meet their needs.

The Results

At its most basic level, using Treeno's software has allowed Fusco to better manage its client documents, allowing the organization to operate in a paperless environment.

Beyond access, users cited "organization" as a key benefit of transitioning to Treeno's solution. The software has created consistency among users with naming conventions and document organization – small details that have a big impact on the team's ability to serve its clients more effectively and efficiently.

Before implementing Treeno, receiving a question from a client meant having to take down the client's information, pull a paper file, find a specific document and return the client's phone call. After Treeno, client service is much more efficient, as users have access to the client's electronic file within seconds.

Using Treeno's software for the past three years has allowed the organization to continue to grow and increase efficiencies, allowing them to devote more time to business development and other initiatives.



Long-Term Benefits

Maintaining client documents electronically has fundamentally improved the Fusco Team's ability to react nimbly in the event of an unforeseen significant business disruption.

Treeno's document management solution plays a key role in Fusco's business continuity plans, giving the team confidence knowing that their ability to serve their clients' needs should not be materially impacted in the event of a fire, flood, natural disaster or other potentially catastrophic event.

Document retention worries are also a thing of the past, thanks to Treeno. Maintaining paper files brought with it costs associated with file storage space; with a cloud-based document management solution, Fusco can continue to grow its business without worrying about running out of space for its paper files.

The biggest benefit of using a document management system are the efficiencies created. Fusco's business model is much more scalable now, giving them the room – and the tools – they need to grow without adding additional administrative personnel.

ABOUT TREENO SOFTWARE

Established in 2002, Treeno Software is a leader in the Enterprise Document Management (EDM) industry. Treeno Software's mission is to provide their customers with operational workflow efficiencies and measurable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web-based Enterprise Document Management (EDM) Software Solution.

To learn how Treeno can help you— call **800.528.5005** or visit us on the web at **treenosoftware.com**.