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- Kevin Pizzotti, Operations Manager

CHALLENGE

LTG Capital wanted to reduce overhead costs and saw cloud computing as the answer. “We are just a three employee company and were paying about \$12,000 for a 3rd party tech company to manage our server, and another \$3,600 for data backup. That’s over \$15,000 a year,” said Kevin Pizzotti, operations manager at the firm. “As one of our largest costs, we wanted to get rid of our server entirely, and getting our documents into the cloud was the first and biggest step towards doing that.”

SOLUTION

With the help of technology advisor Jen Goldman of MyVirtualCOO, LTG Capital found the solution it needed. “We started with Jen about a year ago. Her company came in and has been ramping up our software and technology as it applies to the financial advising world,” Kevin said. “She has helped us move into an entirely cloud based environment and pointed us towards NetDocuments for the document management component. She’s done a great job of orchestrating the whole move and in the end we will experience overall savings of over 50%.”

Cost was not the only compelling reason that NetDocuments fit what LTG Capital wanted to do. “With a server, it was difficult to access our documents away from the office,” said Kevin. “We would use remote access tools but there wasn’t a lot of transparency and it was difficult to collaborate. There was no way to know when someone else was working on a document until you opened it up and you saw that it was a read only.”

Collaboration and document sharing became easy for Kevin and his team. “The check-out/check-in feature is really easy for a multi user office to work together.” said Kevin. “The integration with MS Office and Adobe has been great and makes it very easy to check-out documents, work on them and save.”

“NetDocuments Email Management Service (EMS) is really great. We use our CRM to capture and archive our emails, and now with NetDocuments, when we get emails with attachments, we just drag them into our NetDocuments folder in Outlook and they are backed up and meet compliance,” Kevin exclaimed.

RESULTS

“NetDocuments was one of the most user friendly of the technology changes we made. There’s not a very steep learning curve,” Kevin remarked. “I usually have to train the rest of the staff on new technology and NetDocuments has been so easy for them to just jump in.”

“The other big advantage of NetDocuments is the peace of mind it gives us from a disaster recovery standpoint (and compliance). We used to have elaborate disaster recovery plans and now we have comfort in knowing that all of our files are being stored and backed up offsite.”

For more information about NetDocuments, please call 1.866.638.3627 or visit our web site at www.netdocuments.com.



LTG Capital is a financial advising firm based just outside of Boston that offers comprehensive financial planning.

web site: www.ltgcapital.com