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Case Study - *Financial Services*

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- Mark Connell, President

CHALLENGE

Mark Connell and his firm use Salesforce CRM and needed a way to manage and share documents more efficiently. "Our challenges were that the longer a client was with us, the bigger their folder grew. It became difficult to manage all of the documents," said Mark. "The second challenge was we wanted to have all of our documents in Salesforce.com. We had literally everything that goes on with a client within Salesforce.com except documents."

Mark turned to his client services manager to gain some insights to finding a solution. "I gave her some tasks and assignments and said 'here is this, and this and that, I need you to do this'. I wanted to see her mind-set. The first thing she did was open Salesforce. I realized how much Salesforce is the focal point and we needed to have our documents in there," said Mark.

SOLUTION

"When I found NetDocuments, it was a no-brainer to us," he said. "We found a simple way to do what we needed that is logical, intuitive and easy," said Mark. "I'm a small firm and everything I do is managing costs. The number one rule about business is staying in business and if NetDocuments wasn't cost effective, we wouldn't do it."

RESULTS

Mark's firm can now access everything related to a client from anywhere with one single login. "I have a work in process folder, and say I'm on vacation and I want to update some things while I'm there, I don't have to log in to a remote place or into another application to access a remote drive. I just go to Salesforce.com with a single log-in, go to the client's record, see their document, open it, work on it, save it, check it back in and BOOM! It uploads the most recent version," said Mark. "That is sweet. That is huge."

NetDocuments sales team made moving their documents to the cloud very easy. "The sales guy was great. He actually knew how to configure it and set it up. Most sales guys don't. Most of the time you see sales guys that don't know diddly about how things work and just sell. I was pleased that he could answer my questions without asking someone else," Mark said.

"We now have everything in one platform. It's pretty cool."

Mark C. Connell is President of Mark-Christopher, an Independent Registered Investment Advisor (RIA) and Wealth Management firm that specializes in the affluent and retirement markets. Mr. Connell publishes the quarterly newsletter Wealth Matters, and The Research Account periodical.

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