

Sterling Futures



Company Overview: Comprehensive Wealth Management Services
web site: www.sterling-futures.com
Location: San Francisco, San Mateo, Santa Clara
Industry: Financial
NetDocuments Usage: Document Management
Software switched from: Paperport

CHALLENGE

- "We were storing documents locally using a desktop-based document management system. However, we wanted to meet and exceed all SEC security and compliance features for electronic document storage and retrieval which we could not do with our existing system."
- "In addition, living and working in San Francisco I wanted a disaster recovery plan that would have our firm up and running in a matter of minutes rather than days or weeks."
- "Finally, I wanted all the firm's client and business files to be accessible in a secure manner from anywhere in the world so we could continue to travel extensively without affecting my ability to provide clients with service that far exceeds their expectations. I have always been wary of the risk involved in traveling for long periods with a laptop containing client data."

SOLUTION

- Ease of use. "I like to be able to choose whether to use the Windows file structure to find documents or the search facility."
- "Online uploads and downloads were much faster than I expected and I hardly noticed any difference to accessing documents locally."
- "NetDocuments allowed me to import all files mirroring the Windows file structure we had been accustomed to using. Very little ramp up time was needed and once the painless task of uploading files using the Folder Upload utility tool was accomplished actual usage was very intuitive."
- "I found NetDocs personnel to be very knowledgeable, professional and easy to deal with. They appear to understand that these documents represent my firm's life blood and consequently fast service to answer a question or resolve an issue should be the norm, not the exception."

RESULTS

- "I no longer fear that my laptop will be stolen because there is no longer any client data on it. Consequently, using NetDocuments and knowing that my documents are always securely stored and instantly available I am able to stay away from the office much longer than I could otherwise. For example, I like to spend approximately two months each year in Europe and NetDocuments allows me to do this with complete peace of mind knowing that I lack nothing I may need to service my clients while I am away from the office."
- "While no business is litigation-proof, storing our documents in a non-rewritable, non-erasable time-stamped format at least it gives us a fighting chance that our records will be accepted by the courts and not rejected out-of-hand because they might have been altered subsequent to the event in question."
- "Working with NetDocuments has been a pleasure. This is the only key software application I have used which has been glitch-free since I started using it."
- "NetDocs was surprisingly affordable as I was able to dispense both with my online backup service as well as my local server backup."