

## “We’ve reengineered the entire firm to change the client experience.”

### BOLDLY GO WHERE YOU HAVE NEVER GONE BEFORE

“Everything we do, we do differently than we did 18 months ago. We’ve reengineered the entire firm to change the client experience,” said John Ohmer, CEO of the firm. “It’s made portfolio reporting and financial advising completely different than anything we’ve ever experienced.”

John and his team at YellowBrickRoad accomplished this by setting out to build a truly cloud-based firm starting with CRM and finishing with document management.

“It was a part of our strategic plan to not store anything in the office that would give access to a client’s financial lives. Aside from not having to maintain our own backups, it was a huge potential problem that anyone could come in and steal our server or files and it made much more strategic sense to have everything in the cloud,” John continued.

### HOW DID THEY ACCOMPLISH THIS?

The firm deployed Salesforce.com for its CRM and instantly became a more mobile integrated firm; however, John and his team needed a place for their client-related documents.

“We kept our documents on a shared drive on our server but we felt strategically that we wanted to have our document solution hosted in the sky and we needed it to be SEC compliant and integrated with Salesforce,” John said.

John and his staff took a comprehensive approach to finding the right solution before selecting NetDocuments.

“We looked at all the options available. We looked at Box.net, but they did not have the Salesforce integration functionality. We also looked at LaserFiche and pretty much any other document management option you can name,” said John.

### WHY NETDOCUMENTS

YellowBrickRoad needed a document solution that was web-based, SEC compliant, integrated with Salesforce and simple to set up and use.

**Compliance?** Check. “I don’t want to be burdened by SEC compliance issues so it was satisfying to know that NetDocuments fulfills our SEC recordkeeping requirements,” John said.



YellowBrickRoad Financial Advisors is located in San Francisco and is dedicated to enabling its clients to achieve and preserve personal financial independence. It does this by acting as a client’s personal CFO and delivering personalized and transparent financial advice.

Central to making financial independence a reality is providing its clients with complete transparency and openness which it is doing through a client centric approach to technology.

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**Salesforce integration?** Check. “We really liked the Salesforce integration. Let’s say we’re preparing for a client’s financial review and we open up their record in our CRM and we see something in the Tax Profile that requires us to drill down to something in a specific year. With NetDocuments, we can see all of the documents on the same page and we have all the related details that are not captured in the CRM profile,” John said.

“It really enables us to fetch very productively any document that is needed to provide whatever additional information we need in engaging clients or for preparing financial reviews.”

**Simplicity?** Check. “NetDocuments gave us the ability to architect the filing structure exactly the way we wanted. It allowed us to literally replicate the file structure that we built on our server and very effectively migrate all of the documents from our server to the cloud.



## About NetDocuments

NetDocuments allows you the freedom to access and work on your documents anywhere. Get to the Internet and login to all your documents. Create, edit, share and collaborate with others. Organize into folders based on clients or projects. Search the content of your Word, Excel, PowerPoint, PDF's, and emails.

Have the peace of mind knowing your work is backed up and secured in world-class data centers. Small to large businesses, law firms, financial service firms, health care and real estate organizations can save tens of thousands of dollars by eliminating the hardware, system and client software, and ongoing administration of on-premise systems.

Go to [www.netdocuments.com](http://www.netdocuments.com) for more information.



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