



GREENBUSH FINANCIAL GROUP

INDEPENDENT REGISTERED INVESTMENT ADVISORY FIRM

Greenbush Financial Group (GFG) is an independent registered investment advisory firm providing clients with financial planning, investment management, 401(k), and Medicare services. GFG manages over \$280 million dollars in client assets and has clients located in 22 states.

THE CHALLENGE

Figuring out how to do more with less.

Most investment firms employ six to eight people to manage the level of assets GFG manages. With a staff of only three, GFG needed to identify and deploy the right tools to deliver its clients a premium level of personal service. In search of innovative ways to be more efficient, GFG held regular staff meetings to review the best options. In addition to improving efficiently, other goals included growing revenue, increasing profits, and making the company a great place to work.

The financial industry is highly regulated, which translated to GFG being buried in paperwork. Scaling the business was difficult because staff members were spending way too much time creating files, scanning documents, and rifling through filing cabinets to retrieve documents. Hiring another administrative employee was considered, but GFG wanted a way to scale faster without upping their low headcount.

In addition, GFG wanted to provide employees a great work-life balance. Offering the ability to work from home was desired; however, without electronic access to documents, the traditional paper-based filing system limited what employees could do remotely.

THE SOLUTION

Go paperless and outsource scanning.

GFG decided going paperless was the best approach for making the office exponentially more efficient and secure. After considering its options, GFG called in eBizDocs to help bridge the gap between paper-based and paperless. Rather than purchasing new scanners and training staff to scan all

"We see these challenges in most historically paper-based businesses. Our vision is to help put information at your fingertips and improve efficiency, without disrupting daily business processes."

JASON ABARE

VICE PRESIDENT
EBIZDOCS



VERTICALS: FINANCE, PROFESSIONAL SERVICES



SERVICES: CONVERSION, CONSULTING

THE SOLUTION (CONTINUED)

the existing paper documents, eBizDocs took on the scanning assignment. eBizDocs came in, gathered the paper documents, and delivered them back as PDF files. eBizDocs created a smooth and seamless process, without disrupting day to day activities, even though the files were physically out of the office. This was possible because eBizDocs offers an intuitive and simple file request solution throughout the scanning process. Scanned documents were saved in the specified PDF format and filed into the correct client folders on the server. Employees now have easy, secure, and immediate access to client files, from anywhere at anytime. It also eliminated having employees leave their desk to go searching through multiple filing cabinets 10+ times a day.

Going paperless doesn't have to be an "all or nothing" proposition. In order to establish new accounts and satisfy industry regulations in a streamlined way, GFG still uses paper forms when setting up new clients. Gathering all the initial information digitally can be very inconvenient for both the client and advisor. For GFG, it's much easier and more cost effective to start with a paper form, and then have eBizDocs scan in all of their physical documents on a scheduled basis. Plus, eBizDocs uses state of the art scanning technology and 20 years of proven processes. The quality is exceptional and far superior to what most desktop scanners can produce. Saving time and allowing employees to focus on the important aspects of their job made the benefits of outsourcing the scanning process obvious.

"The cost to outsource eBizDocs scanning service is nominal compared to the number of hours it saves each week. The efficiency gains deliver a powerful ROI and allows us to conduct business in new and innovative ways."

MICHAEL RUGER

CIO
GREENBUSH FINANCIAL GROUP

THE RESULTS

Happy employees focused on satisfying clients and growing the business.

GFG employees are thrilled eBizDocs helped take the worry out of the paperwork aspect of the business. Eliminating ugly filing cabinets means the reclaimed floor space is available for more productive use. The convenience of having remote access brings a better work balance and quality of life to employees and allows them to better service clients. This translates into better productivity, a great work environment, and helps GFG fulfill the companywide goal to do more with less people without sacrificing customer service. Today, advisors are completing more work out of the office and growing the company at a faster pace than what was previously possible.



eBizDocs is a premier digital transformation provider focused on helping you put *information at your fingertips*. Offerings include paper and microfilm conversion, content capture and document management solutions, scanner sales and service, and process consultation. eBizDocs is SOC2 Type II certified and serves private and public-sector organizations. The company has been in business for over 20 years and is a preferred source contractor for NYS entities. To learn how eBizDocs can help transform your operation, visit ebizdocs.com.

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