

CASE STUDY

Quintes Invests in the Future with Intellera and Laserfiche

When the President of Quintes founded the company, he had a vision of how his documents and information would be managed and knew that technology would play an integral role. He found a software solution that seemed to fit his requirements, but as he and his employees worked with the software, they realized they needed a solution that would align better with the way they did business.

It is rare to find a vendor like Intellera, with the technical expertise, business knowledge, staffing and culture required to understand your needs and is willing to dedicate themselves to implementing a tailored solution that integrates with your existing technology.

Steve Shearn,
CPFA, Quintes





The customer

Quintes was founded in 1986 and specializes in corporate retirement plans along with individual wealth management. Based in Salinas, California, the company's mission is to be viewed as the quintessential provider of retirement plan services because they deliver the ultimate retirement plan experience. Firms in the financial services business deal with a lot of paper and Quintes was no exception. Managing and centralizing their documents was a top priority.

The challenge

Client onboarding, termination notifications, compliance forms – all involved a lot of paper, lengthy processing time and manual interaction. Finding a reliable document management solution had been important from day one. While they had found a solution that had the functionalities they required, Quintes soon learned that the software was more of an “out of the box” solution that did not adapt easily to Quintes' workflows and processes. The software did not integrate easily with Quintes' existing systems, often causing their system to crash. The IT team had invested a lot of time and effort with the software but as the date of renewal approached, it became apparent that Quintes would have to find a new, document management solution that was much more adaptable to their business needs.

After reviewing the alternatives on the market, Quintes chose Laserfiche, an enterprise document and content management system that would provide the functionalities that Quintes required but could be tailored to Quintes' business processes. Intellera had been recommended as a Solution Provider who could deliver the implementation Quintes desired. “Many vendors promise a high touch, smooth, painless document management solution, but most want you to change your business processes to match their product capabilities. M-Files was a good product, but the implementation didn't work for us. We did our due diligence with Laserfiche,” said Steve Shearn, President of Quintes. “We decided that our next major project would be migrating our data to Laserfiche and then automating our manual workflow structures. We'd met Intellera at a conference and decided they were the ones to help us get Laserfiche up and running,” he added.

The solution

The migration of data can be more complex than expected. A new relationship, new product and new structures - all have to be mastered quickly

to succeed. Intellera worked closely with Quintes to review their current processes and identify opportunities for improvement while forging a relationship that would build trust and credibility. The team took responsibility for migrating the data from M-Files to Laserfiche, a project that was completed successfully. "I didn't know Intellera at the start of this project. I was concerned about whether they could handle the migration, but they came through with flying colours. It is rare to find a vendor who has the technical expertise, business knowledge, staffing and culture required to understand your needs and is then willing to dedicate themselves to implementing a tailored document management solution that integrates with your existing technology." Steve explained. "I got to know the president of Intellera and was impressed with his manner and hands-on involvement. He was able to find solutions and I respected that he never pointed fingers, he just got the job done."

The results

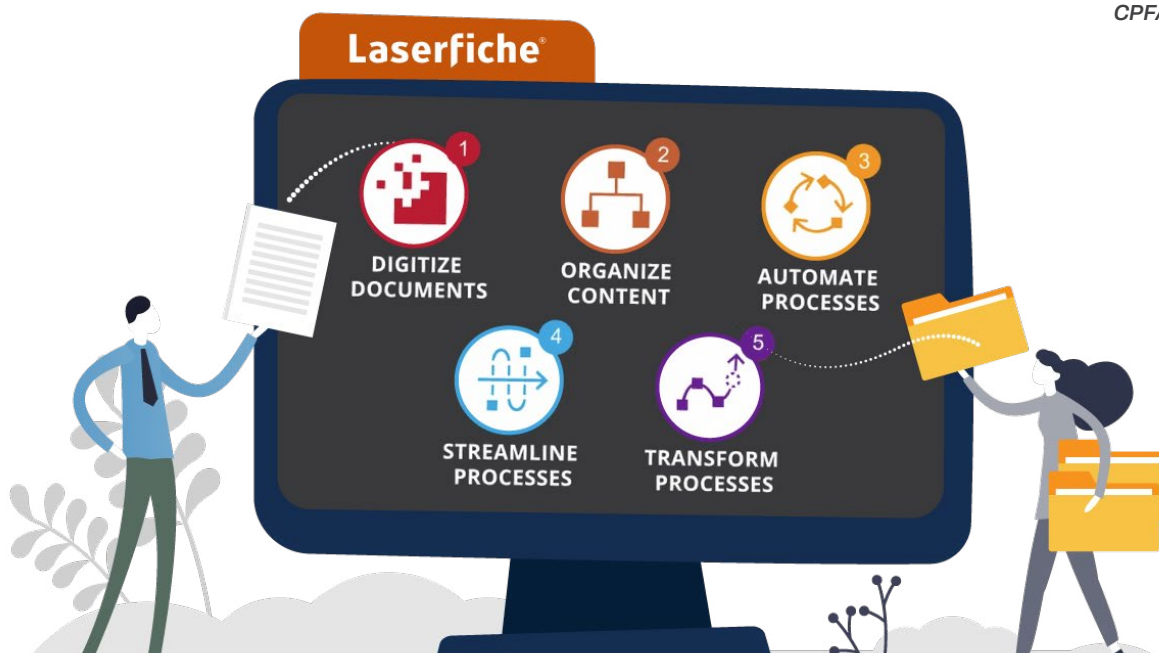
With the data successfully migrated and certain automations in place, the next step was training. Intellera believes in empowering clients so they can become proficient and independent in the use

of the software if they so choose. The Intellera team recently finished training the super-users at Quintes so the staff is now fully operational.

The next phase of the project involves automating more of Quintes' manual workflows. Steve Shearn is eager to start.

I had a clear vision for my business. Electronic signing, automated workflows, this is where the future is. I want to invest in technology that will grow my business. I found a great document management partner. Intellera was built from the ground up based on the core concepts of collaboration and accountability. Working with Jonathan's team is truly a partnership. Like any great marriage or successful business partnership, the rewards grow over time. I am looking forward to the future.

Steve Shearn,
CPFA, Quintes



(866) 432-2511

intellera.com 1751 Richardson, Suite 6.110 Montreal, Quebec, Canada H3K 1G6

 **intellera**