

Hirtle Callaghan simplifies business processes with electronification

Hirtle Callaghan, one of the largest and fastest growing privately-owned investment service firms, simplified many of its paper-based processes with DocuSpace Workflow.

Hirtle Callaghan chooses DocuSpace Technologies to implement paperless office

Los Angeles – January 22, 2009 – Faced with regulatory requirements, high customer service standards, and exceptional growth, the senior management of Hirtle Callaghan, one of the largest and fastest growing privately-owned investment service firms, realized their paper-based processes needed an overhaul to enhance the company's competitive edge.

The investment management business is characterized by the need to process large volumes of information and documentation. Each client account includes new account applications and related paperwork, trading confirmation documentation and month end statements. Additionally the business of managing accounts generates a large quantity of paper-based and computer-generated reports. Prior to enlisting DocuSpace, Hirtle Callaghan documents were stored in file cabinets.

Managers faced the constant challenge of maintaining and storing valuable information and lacked fingertip access to that same information in the daily process of doing business. Efficiencies were compromised by the antiquated document and information management system. In response to those challenges Hirtle Callaghan launched an extensive evaluation process of document management and workflow technology companies.

“We knew we needed to select a company with a strong technology platform and one that would serve as a long term strategic partner. Further we needed a partner that would be a good fit within our culture. At Hirtle Callaghan customer service is our highest priority.

The company we selected would have to value customer service as highly as we do,” said Delia Algeo, project manager at Hirtle Callaghan. With those clear cut objectives in mind, Hirtle Callaghan chose DocuSpace. DocuSpace is an integrated suite that includes document imaging, electronic document management, workflow, and records management. The DocuSpace system provides each user with electronic access to all documents and related information, to which they are authorized, while providing for the capture, storage and retrieval of the documents. Complete client files are available online, and users can access the data without regard to file type or the source of the information.

Because the information is available electronically, multiple users have simultaneous access eliminating the wait for crucial information, improving customer service, and eliminating the risk of lost files. Hirtle Callaghan further increased efficiency by using the DocuSpace Workflow technology to automate their business processes. “We made a strong

commitment to make our documents paperless and available. Docupace is one of the few companies I've ever worked with that consistently met or exceeded all expectations," Algeo said. Gone are the rows and rows of cabinets that once overwhelmed the office. Office space has been reclaimed to help support the growth Hirtle Callaghan continues to enjoy.

About Docupace Technologies Docupace Technologies provides a state-of-the-art, web based integrated suite including document imaging, electronic document management, workflow, and records management. Docupace serves a wide business spectrum including broker dealers, financial advisors, real estate, insurance and other organizations. Docupace plays a vital role in helping companies of all sizes save money and improve productivity by managing the storage, organization and retrieval of relevant information through their simple desktop interface. For more information visit www.docupace.com

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