

netdocuments® CASE STUDY



WEBSITE: fmfinancial.org

USERS: 35



PRODUCTS



ORGANIZE

- NetDocuments
- ndMail
- ndOffice



PLAN

- Chatlink
- Tasks



DELIVER

- CollabSpaces
- SetBuilder

FM Financial Finds Document Management Partner for Productivity Gains, Intuitive User Experience, and Seamless Integrations

About FM Financial

FM Financial was founded in 1986 to provide professional guidance and investment management from a Biblical perspective. With assets under management now exceeding \$560 million, [FM Financial](https://fmfinancial.org) offers a full range of services in the areas of financial and estate planning, investment management, gift administration, legacy strategies, and loans to qualified churches.

A Vision for the Future

In 2002, Richard Morton, Strategic Initiatives Analyst at FM Financial, was responsible for the Information Technology department and knew he wanted to implement an efficient document management system (DMS).

“For years, I sat outside the central records room where we housed paper files for the company and would see administrators go in and come back out hours later after trying to find a misplaced file,” says Richard.

This was before the prevalence of electronic documents, so leadership saw a DMS as a cost and didn’t recognize the potential benefits. Twenty years later, most of their technology is in the cloud, and the new generation asked for a more advanced solution to manage the hundreds, if not thousands, of sensitive records they work with daily.

With a current need and a view towards the future, the company decided to pursue a new document management system.

The Search Begins

FM Financial is a very process-oriented company and needed a flexible DMS that supports the way its people work. Commercial off-the-shelf copier products that often claim to be a complete DMS could not efficiently deliver a scalable solution to address the companies' growing needs.

They were looking for:

- Robust security to ensure their sensitive documents remain safe
- Seamless integrations with Office 365 and Salesforce
- Overall productivity gains, improved efficiencies, and a return on investment
- An intuitive experience that makes it easy for teams to find what they need

It became clear that FM Financial needed the advanced capabilities of a modern cloud-based DMS. They explored multiple options, including [NetDocuments](#). As Richard explains, "I've been in IT a long time and, with the name recognition of NetDocuments, I knew they'd be on the table when we got serious about looking into document management."



"If security protocols weren't high enough, a provider didn't get a second call with us...it was really important to us that we partner with a provider that takes security as seriously as we do."



Deciding on the Right Solution

The foundation did its proper due diligence in exploring several solution providers, initially working with six, then whittling it down to four before selecting NetDocuments.

SERIOUS ABOUT SECURITY

FM Financial takes security very seriously. They are responsible for complying with strict government guidelines, such as those enforced by the Security and Exchange Commission (SEC). Monetary sanctions can be imposed on organizations in violation of SEC standards.

"If security protocols weren't high enough, a provider didn't get a second call with us. Our obsession with security is in part due to being in a regulated industry, but we are also highly sensitive to the fact that we're handling sacred documents for people — their wills, their trusts, and money. So, it was really important to us that we partner with a provider that takes security as seriously as we do," says Richard.

SEAMLESS INTEGRATIONS & IMPROVED EFFICIENCIES

The company relies heavily on Office 365 and Salesforce in its daily workflow, and they needed their DMS to support, if not enhance, those efforts.

“With NetDocuments,” explains Richard, “there are opportunities in the document creation process to rethink what used to take hours or days and cut that down to minutes. Our teams can collect data in Salesforce, push a button, and automatically generate the document(s) they need.”

FM Financial also recognized how deeply NetDocuments is embedded into Office 365, which opens up additional possibilities for streamlined processes and efficiency gains. They identified that there could be opportunities to consolidate redundant technologies. For example, FM Financial will be exploring [CollabSpaces](#) for working and sharing documents with external parties, instead of maintaining separate licenses for a single purpose file-sharing tool.

EXPERIENCE MATTERS WITH DOCUMENT MANAGEMENT

When FM Financial began their search for a new DMS, they knew the user experience would be important, but what also made NetDocuments stand out was the buying experience.



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As Richard describes it, “When we were talking to other vendors, they wanted to sell us their solution. But when we talked to NetDocuments, it was ‘What problem can I solve for you?’ And we appreciated that.”

In the end, explains Richard, “The intuitive nature of NetDocuments was really the tipping point for us — it’s just so easy to use.”

Partners in Building the Future

Together, the FM Financial and NetDocuments teams carefully evaluated and identified FM Financials' unique business needs and developed a strategic plan to support the company on its DMS journey.

"We're very process-oriented people and have appreciated that we can come to NetDocuments with what our process is and know it isn't their first time around the block," says Richard.

FM Financial is partnering with [Element Technologies](#) for a successful setup, implementation, and content migration planned in phases to start small and then scale to the rest of the organization.

eLe^oMENT

The company looks forward to experiencing the immediate benefits of the NetDocuments platform and making work easier for the people at FM Financial, which ultimately benefits the many customers and stakeholders they serve.

About NetDocuments

NetDocuments is the world's #1 trusted cloud-based content management and productivity platform that helps legal professionals do their best work. Backed by over 20 years of experience in cloud innovation, NetDocuments supports 3,500+ law firms, corporate legal departments, and public sector entities with solutions that drive better user experiences and business outcomes. NetDocuments offers a complete end-to-end platform for document and email organization and management, including award-winning security and research capabilities, robust collaboration and search technologies, seamless integrations with other tools professionals use daily, and much more.

Contact us at (866) 638-3627 or visit www.NetDocuments.com to learn more today.

