



trumpet

Trumpet Success Story GIANELLI & ASSOCIATES



Client

Gianelli & Associates

Industry

Legal

Challenge

To find a convenient, easy-to-access way to share dozens of estate planning documents maintained in the firm's Worldox® document management system with a growing portfolio of more than 500 clients.

Solution

Trumpet Publisher for ShareFile enabled Gianelli & Associates to quickly and easily publish estate planning documents from Worldox to ShareFile. This allowed safe, convenient access to valuable documents including:

- + Deed of Trust
- + Power of Attorney
- + Health Care Directives

Results

Full firm-wide adoption and acceptance of ShareFile as a simple, convenient solution for secure access to client estate planning information.

“As soon as Publisher came online, our ShareFile portal started getting used regularly and significantly.”

Enabling Instant Client Access to Estate Planning Documents

With Publisher for ShareFile, Gianelli & Associates fully embraced the power of ShareFile to give its clients convenient, secure online access to their estate planning documents.

The Challenge

Citrix® ShareFile is a great solution for creating password-protected, easy-to-access portals to share files with employees, partners and clients—IF you actually use it.

After making the decision to go paperless and implement the Worldox document management system, Modesto, California-based Gianelli & Associates wanted to ensure that their estate planning clients had a simple and secure way to access the documents that ensure that their succession and estate planning is on track and up to date.

For more than 18 months, Worldox had proven its value to the firm, allowing them to easily access to documents firm-wide. However, when it came to delivering a convenient way to share documents with clients, the lack of integration between Worldox and ShareFile meant that adoption of an online client portal solution was low.

The Solution

After asking Worldox for a recommendation, Gianelli partner Jay Pink contacted Trumpet to learn how the company's Publisher software might help them to integrate Worldox with ShareFile to simplify the process of sharing information with clients. Pink was already familiar with Trumpet, having used the company's Symphony Profiler software to scan and index documents in Worldox. They had also used Trumpet's Symphony OCR software to automatically perform optical character recognition on their documents for enhanced searchability.

“I love that Trumpet has products that improve productivity and solve problems,” said Pink. “They build bridges between the programs we use every day.”

Trumpet's Publisher software makes it easy to publish documents securely to an external Web portal like ShareFile.

“It's a clean integration with Worldox.” said Pink. “There are a number of estate planning documents that our clients need to keep for the rest of their life.”

“Using Symphony Profiler, we put a cover sheet on those documents, scan the files and they automatically show up in Worldox. Using Publisher, you highlight them all and click 'Send to Portal.' It's that simple.”



Gianelli & Associates

Serving clients throughout Stanislaus County and San Joaquin County, Modesto, CA-based Gianelli & Associates helps clients with estate planning, business law, litigation, real estate, probate and family law.

Trumpet, Inc.

Forward-thinking and always focused on making life better for our clients, Trumpet has devoted nearly two decades to developing and implementing document management and workflow automation tools for the financial and legal markets.

If you need to simplify, streamline or automate a document-driven process in your organization, contact the Trumpet professional services team.

The Results

Prior to Publisher, using ShareFile to share documents with clients via an online portal was a manual process. As a result, it was rarely implemented.

Since implementing Publisher, adoption of the client portals has skyrocketed.

“We had the portal for a year and a half and Publisher for three to six months. As soon as Publisher came online, our ShareFile portal started getting used regularly and significantly,” said Pink.

The firm currently has 100 clients utilizing the ShareFile portal and expects that number to grow to 500 in 2016.

“The adoption of ShareFile wouldn’t have happened if Publisher wasn’t so easy to use and so seamlessly integrated into Worldox,” said Pink.

As a result, Gianelli’s clients now have convenient access to important estate planning documents whenever they need them, with minimal effort from the Gianelli staff.

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