

New ways to work smart:
*How Worldox and Trumpet changed
the deal for one Financial Services firm.*



LODESTAR

**Lodestar Personal
Asset Management**

Challenge:

To implement a Document Management System with the widest range of capability, including direct scanning and fully integrated document relationships.

Solution:

Worldox installed, along with several helpful financial planning add-ons from Trumpet.

Result:

Complete control, centralized document handling – a HUGE increase in efficiency over pre-Worldox operation.

“It turned out to be a surprisingly easy transition.”

By Angela Aboujaoude

Office Operations Manager, Lodestar

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With the sheer number of documents we generate, receive and manage for our clients, the need for some sort of document management system had become obvious at Lodestar. The problem was, we didn't know much about available options, and had no idea which solution might be best for us.

A timely connection

I'd heard good things about Trumpet, Inc. They came highly recommended by colleagues at other financial services firms who had used them to help implement software for document handling and workflow improvements. That expertise was exactly what we needed, so I decided to give Trumpet a call.

They recommended Worldox for document management, and suggested several other financial planning applications and products (including *Virtuoso*, and *Assemblage*) that could be integrated with Worldox.

The pricing was reasonable. Even more important, it felt right. We could already see that the support and training we needed would be there. It was an easy decision to make.

A smooth, painless transition

Working with documents this way was a big change for our firm, but it turned out to be a surprisingly easy transition.

Trumpet took care of all installation and set-up, and also provided pretty extensive training and documentation for our users. They made it easy to get up and running. So much so, we've had no need for technical support directly from World Software. We had high expectations ... Trumpet did even better than we'd hoped.

Lodestar Personal Asset Management

“In a recent SEC audit ... we were able to respond to document requests almost instantly, thanks to Worldox marvelous search capabilities”

“I’m most impressed with the relationship between Trumpet and World Software. They work closely together, and that’s very much in our favor.”

The Worldox difference

It’s been a little over three years now since we started with Worldox. We use all the standard document management features - filing, searching, emailing documents. Everything is centralized, completely controlled.

BIG difference. The time saved compared to how we did things before is huge; the longer we use Worldox, the more efficient we get, and the more time we save. The training materials Trumpet gave us make bringing new employees on board simple and straight forward.

It turns out to be quite a space-saver too. With document control in place, we were able to consolidate storage and remove several large filing cabinets from the office.

I particularly like how Worldox lets you convert a document to PDF and save it in the same location. That’s *incredibly convenient*.

The moment of truth came in a recent SEC audit here at Lodestar. We were able to respond to the auditor’s document requests almost instantly, thanks to Worldox’ marvelous search capabilities. Our response time was so much faster than before. *It made everything easier.*

One more thing

I’m most impressed with the relationship between Trumpet and World Software. They work closely together, and that’s very much in our favor. All our requests are answered quickly and accurately.