

Cambridge Financial Group

Partnering with the Gordon Flesch Company earns superior returns in information management and efficiency.



“We needed a partner who could help us integrate up to 50,000 pages per month in multiple formats — and merge them seamlessly with our own business processes and existing information systems. The Gordon Flesch Company came through for us.”

Mike Adams
Director of Information Technology
Cambridge Group

Industry:

FINANCIAL MANAGEMENT

The Challenges:

Leading financial company needs updated — and novel — approach to manage information — and communicate with clients.

- Providing comprehensive investment diversification for more than 3,000 institutional and individual clients means a lot of paper — especially at the end of the month
- Managing thousands of statements demands a great deal of time, energy and space for storage. It also creates the possibility of human error.
- Leading company wants to communicate with clients in a manner that reflects their brand identity

The Solution:

Create a partnership with the company by capturing great quantities of information in a usable way.

- Provide a top-to-bottom analysis of information workflow and design a tailored solution
- Using Laserfiche® software, convert information from dozens of brokerage firms into a manageable database, allowing simple composite investor returns to be generated and shared
- Provide compatible equipment to streamline all processes

The Benefits:

Substantial efficiencies are gained by automating information gathering — and sharing. The information is used to communicate with sophisticated customers quickly and accurately.

- **Reduce manual sorting** — Automatically capture information from thousands of separately sourced documents
- **Transfer information easily** — A line of Canon scanners seamlessly integrates with the firm's reporting software
- **Reduce storage space** — Electronic information demands far less physical space than traditional paper documents
- **Save salary** — Substantial reduction in filing saves personnel hours
- **Speed up turnaround time** — When thousands of documents arrive, they are put to use in six hours — instead of up to three days with the firm's old information management system



The Background

Cambridge Financial Group manages hundreds of millions of dollars for institutional and individual investors. Founded more than 20 years ago and headquartered in Columbus, Ohio, the firm is dedicated to earning consistent returns for its clients by utilizing two complementary strategies—price momentum and value investing—when managing equity portfolios. The firm's investment management team prioritizes diversification in every portfolio, drawing from hundreds of mutual funds and other investment vehicles offered by dozens of brokerage firms.

With so many different resources put to use for their clients, investment reporting can be a daunting task—especially considering Securities and Exchange Commission (SEC) requirements. The Gordon Flesch Company changed the way such information is captured, sorted and shared.

The Story

At Cambridge Financial Group, the amount of information that needed to be captured and compiled was expanding exponentially for three reasons.

- A growing client list
- Many more investment options for those clients
- An expanding universe of investment sponsors

This deluge of information was quickly becoming unwieldy. Imagine one client's investment portfolio consisting of individual stocks, bonds, mutual funds and other products. Then consider that Cambridge prioritizes services for more than 30 separate brokerages. Suddenly, the firm is receiving dozens of statement pages for each client every month. Now multiply that by more than 3,000 clients and it's easy to see how daunting the task could be. It began to take too much time to sort the returns, compile them and aggregate them to report to their clients.

The firm was technically savvy once it had the information. But extracting the information from so many sources was the difficult part—until the Gordon Flesch Company came up with a solution. They designed a system using Laserfiche® software to find, capture and sort the information. Once the data was in a uniform format, it was transferred seamlessly into Cambridge's own compiling and reporting programs. Combined with Canon hardware—including imageRUNNERS and Scanners—the process became virtually automated.

The result is substantial reductions in staff needs, storage space and turnaround time.

The Conclusion

An information system that was bogged down by paper and inefficiency is now converting and compiling information from hundreds of sources into a digital—and usable—database.

Founded: 1956

Headquarters: Madison, Wisconsin

Employees: 600+ strong, and growing

Divisions: Gordon Flesch Company,
GFC Leasing, and
GFC Onsite Services

Products

- Copiers
- Document management solutions
- Multifunction devices
- Printers
- Scanners
- Software

Services

- Customized software solutions
- Document imaging
- Equipment training
- Mailroom staffing
- Managed print services
- Reprographics
- Software training
- Technical support
- Workflow analysis

Support

- Certified systems engineers and analysts
- Customer support representatives
- Highly tenured service technicians
- Large, local parts inventory
- Technical support representatives

www.gflesch.com