



## **Brant Management Experiences a 20% Increase in Productivity and Adds a New Revenue Source with FileWorks Online™**

### **The Challenge**

Brant Management, a homeowner association (HOA) management service, processes thousands of documents while handling HOA business. Managing and distributing paperwork was consuming an excessive amount of staff time.

The company needed a way to streamline operations and to provide HOA clients with easy access to documents relating to their specific HOA.

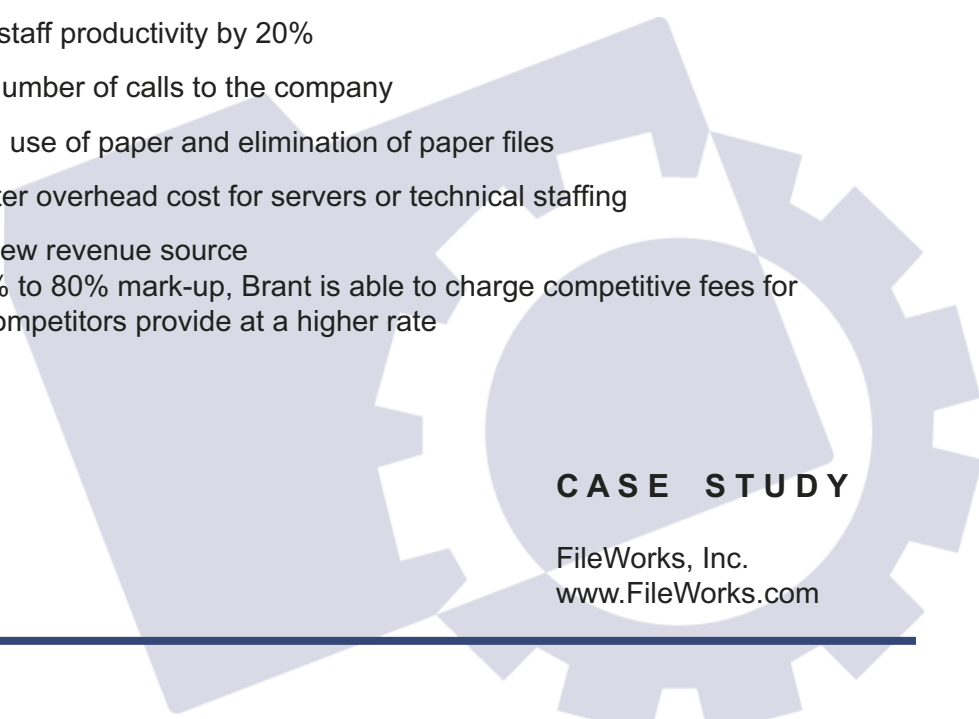
### **The Solution**

FileWorks Online™ provides secure online file storage that is accessible from any computer with an Internet connection. It offers a high-level of privacy and security with a flexible, easy-to-use interface.

### **ROI**

After implementing FileWorks Online™, Brant Management saw immediate improvements, including:

- Increased staff productivity by 20%
- Reduced number of calls to the company
- Decreased use of paper and elimination of paper files
- No computer overhead cost for servers or technical staffing
- Bonus: A new revenue source  
With a 50% to 80% mark-up, Brant is able to charge competitive fees for services competitors provide at a higher rate



## **CASE STUDY**

FileWorks, Inc.  
[www.FileWorks.com](http://www.FileWorks.com)

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# Brant Management Experiences a 20% Increase in Productivity and Adds a New Revenue Source with FileWorks Online™

*FileWorks Online™ streamlines filesharing process and cuts costs for homeowner association management company.*

## EXECUTIVE OVERVIEW

Brant Management needed a solution that would allow its staff to manage the storage and distribution of thousands of documents while giving its HOA clients access to specific documents. The filesharing process was consuming a substantial amount of staff time. To solve these issues, Brant Management selected FileWorks Online's virtual file cabinet which made the process more efficient by providing:

- Secure Web-based file sharing and storage
- An easy-to-use interface for users with varying levels of computer knowledge
- Convenience for clients, who can retrieve documents at any hour
- Controlled access to folders to comply with privacy needs of homeowner associations and clients
- No computer overhead cost for hardware, software or technical staffing
- Additional income while remaining low cost for clients and homeowner associations

## CORPORATE PROFILE

Brant Management provides management services for condominium, town home and homeowner associations (HOAs) for properties of 6 or more units in the Denver metro area. Differentiating itself from other management companies that manage both the building and the association, Brant Management focuses primarily on homeowner association management and community building.

A key element of the company's success is its ability to foster communication. Brant Management is committed to using the latest technology to help homeowner associations communicate with residents, deliver business and financial services, and provide association governance, management and maintenance.

## THE BUSINESS CHALLENGE

Brant Management, a growing HOA management company, needed a way to control the mountain of paperwork it processes and shares with its homeowner association clients. Emailing documents was no longer feasible and the company sought to cut down on paper consumption. Brant Management also needed a solution that would permit clients, with varying levels of computer expertise, to access a large number of documents without creating a burden on staff time.

According to Philip Brant Michaelson, owner of Brant Management, the company tried two solutions prior to implementing FileWorks Online. One solution was specific to the property management industry, but it was time consuming to upload documents and required employees to make double entries. The other option the company tried involved internal software, but it was unable to meet the company's specific needs.

Michaelson then considered—but ruled out—remote desktop technology, which requires that computers be left running and connected to the Internet making them more vulnerable to attack. He was also apprehensive about providing access to his company’s internal network.

**THE FILEWORKS ONLINE™ SOLUTION**

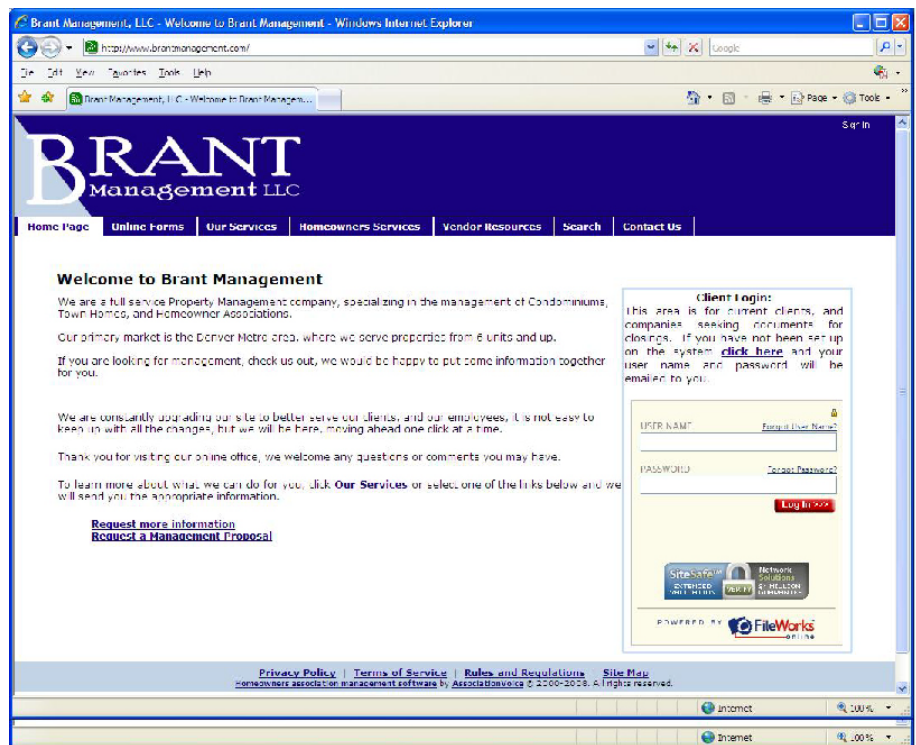
The system that Brant Management was using to distribute documents to clients was consuming too much staff time. Email attachments could not be mailed in bulk without being blocked or filed in spam folders by some clients’ spam filters. Some emails with large file attachments would be rejected by email systems with restrictions on larger file sizes. The industry-related website-development software the company used was cumbersome and time consuming.

To address these problems, Michaelson turned to the Internet to search for file sharing resources and discovered FileWorks Online™. Implementing FileWorks Online™ streamlined the information distribution process, eliminated email bouncebacks resulting from large file attachments, and provided a central location for storing and sharing information with the company’s HOA clients.

The FileWorks Online™ system is seamless, appearing as part of the Brant Management website. Users log in to FileWorks Online™ using a login panel (see graphic) embedded in the Brant Management homepage. Inside the account, the Brant Management logo is displayed prominently at the top of the window. Building the company’s brand is an important part of Brant Management’s community-building strategy.

With FileWorks Online™, Brant Management’s staff developed an efficient process for sharing files while maintaining privacy. A series of folders is created for each HOA. Individual homeowner-members are then set up on the account and given rights to appropriate folders. Every document associated with the HOA is filed in FileWorks Online™, including financials, governing documents, meeting minutes, copies of invoices, meeting schedules, etc. Paper files have been eliminated and the documents can remain stored in the account indefinitely, providing a historic archive for the association and the management company.

Some of the files stored and shared by Brant Management include confidential or private information. FileWorks Online™ complies with the technology standards required by stringent privacy regulations, such as HIPAA, for transmission security, data integration, access control, authentication and auditing. All documents uploaded to the system are transferred using 128-bit SSL encryption. Additional security on the FileWorks Online™ servers encrypts files after they are uploaded. FileWorks Online’s audit trails track who has seen a file, allowing Brant Management to maintain proof of delivery.



Individually controlled user access allows Brant Management to provide HOA board members admittance to folders containing information exclusively for their review. Similarly, folders are reserved only for brokers and title companies to provide the information they require.

Michaelson and his staff can use the notification tool to alert themselves or specific clients by email or text message when documents are uploaded to particular folders. Other tools, such as document notes, store additional information with the documents. Email links direct clients to specific folders or documents.

“FileWorks Online™ has proven to be the simplest and most efficient way to upload and post thousands of documents,” said Michaelson, whose account now holds gigabytes of data. “The FileWorks Online™ layout is similar to Microsoft Explorer, which makes it rather intuitive for our clients.”

The system is accessible to clients 24 hours per day, seven days per week, allowing users to log in at their convenience. The easy-to-use interface minimizes calls to Brant Management and FileWorks™ offers free, live-person, North America-based technical support.

By relying on Software-as-a-Service (SaaS) pay-as-you-go technology, Michaelson avoids investing in server hardware and software, leaving that part of the technology to experts so he and his staff can focus on their core competencies. FileWorks Online has also helped Michaelson generate income by charging some users when he provides them access the service.

“FileWorks Online has increased our productivity by at least 20%. In terms of staff time and salary dollars, that’s a significant savings for our business,” said Michaelson. “FileWorks Online has also provided us with a new revenue source. We are able to mark-up the services by 50 to 80 percent and still charge a competitive rate for the same services provided by an online HOA document service.”

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#### ABOUT FILEWORKS ONLINE™

FileWorks Online™ is an affordable virtual file cabinet for centralized storage and safe sharing of files with anyone, anywhere at any time. Extensive rights controls allow account owners to give others access to the account at varying levels and with varying individual rights. Access to files is tracked and may be reviewed for eDiscovery and audits. Pricing starts at \$29.99 per month, which includes real-person, North America-based customer support.

Delivered online as Software-as-a-Service (SaaS), FileWorks Online™ relieves companies and IT departments of the time and expense burdens associated with running a complex filesharing server. Data is protected by state-of-the-art security. FileWorks Online™ is Intel® Certified, which ensures that it is enabled for Intel® technologies, free of all known significant security vulnerabilities, and monitored for security issues. Extended site validation through Network Solutions' SiteSafe ensures 128-bit encryption during transmission and a \$1 million relying party guarantee. With FileWorks Online, all files are encrypted while stored on the server—a security feature rarely offered by other online document storage services.

FileWorks Online™ increases a business’s effectiveness and efficiency with its unique built-in features, including:

- file sharing inside or outside of the company
- email links to direct other users to specific files and folders
- the ability to custom brand the account with a company logo and offer branded login options
- email and text notifications when activities occur in the account
- electronic signatures for legal or internal sign-off on documents
- integrated scanning that takes documents from the scanner directly to specific folders
- online faxing from and into the account
- document notes for making notations with a document



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