

AgilLink helps Gursey | Schneider keep an eye out for clients

Next-generation business management software helps streamline workflows, increase responsiveness and improve guidance

Founded in 1979, Gursey | Schneider is widely recognized as one of the premier family law, accounting and business management firms in the United States. The firm is known for providing dedicated and personalized service. “Because of our size, we’re attuned to detail and making sure all of our clients’ needs are met,” says Jo Anne Swartz, manager of business management at Gursey | Schneider. “We can be more attentive than some of the larger firms.”

Like many firms, Gursey | Schneider has digitized a wide range of everyday business management and accounting tasks, including maintaining general ledgers, managing payment approvals, reconciling accounts, generating financial reports and more. “We rely on business management software to enhance internal efficiency and offer a responsive experience to clients,” says Swartz.

“In the past, we often had to run a report in one application and then launch another piece of software to see the result. With AgilLink, it’s like one-stop shopping.”

Jo Anne Swartz, manager, business management



Challenges

- Increase workflow efficiency by consolidating information
- Improve collaboration by standardizing the presentation of client data
- Access detailed transaction information fast to be more responsive to client requests

Solution

AgilLinkSM by Datafaction

Results

- Increased administrative efficiency with a single program for all business management functions
- Simplified collaboration by standardizing data
- Enhanced responsiveness to clients with improved insights into client information

For several years, the firm had been using Datafaction's legacy software for core business management functions. The software met the firm's needs, but business managers saw opportunities to further streamline processes. For example, business managers wanted faster access to client information. "We often had to go back and forth between the multiple software modules—one for a general ledger and the other for documents," says Swartz. "To enhance efficiency and be more responsive to client requests, we wanted to consolidate that information into a single program."

Staff members also wanted to more quickly dig into financial data so they could provide better guidance to clients. "We often need to drill down and see what charges comprise each line item of the bank or credit card statement," says Swartz. "We wanted a way to reach that level of detail in fewer steps."

UPGRADING WITH A TRUSTED ALLY

When Datafaction announced the release of AgilLink, its next-generation business management solution, the Gursey | Schneider team was eager to learn more. "A member of the Datafaction team demonstrated the new software, and we saw some of the improvements that we were looking for," says Swartz. "We recognized that we could improve the efficiency of processes and deliver information to clients faster than before."

Gursey | Schneider decided to transition several clients to the new solution at once, and Datafaction was ready to address any issues that might arise. Datafaction can help organizations capitalize on new features and integrate AgilLink into their existing workflow while minimizing complexity. "The Datafaction team helped us make it as easy as possible," says Swartz. "They set goals to meet and have exceeded those targets each time."

ACCESSING DATA AT A GLANCE

Swartz valued the ability of AgilLink to consolidate data, bringing information and functions from multiple programs into a single place. "In the past, we often had to run a report in one application and then launch another piece of software to see the results," says Swartz. "With AgilLink, it's like one-stop shopping."

Having a single repository for all business transactions makes it easier to serve clients, which means business managers no longer have to search for transactions across multiple sites and services. Placing every transaction in a single place also allows Gursey | Schneider to identify trends and makes it less likely that a bill might slip through the cracks. "It makes our job easier that everything is in one place," says Swartz. "That's the bottom line: The software is much more user friendly."

ENHANCING COLLABORATION BY STANDARDIZING CLIENT DATA

AgilLink has helped Gursey | Schneider standardize accounts so staff members can serve any client at a moment's notice. For example, if a client has an urgent need and the assigned manager isn't available, any authorized business manager can log into the client's account and locate required data without confusion. "Staff members now can pick up client accounts and find everything where they expect it," says Swartz.

Standardization also facilitates collaboration. Key employees can specialize in certain types of transactions or services and be able to find the exact information they need in each client's account. "AgilLink has improved our internal efficiency," says Swartz. "We wanted to make it simple for employees to move back and forth."

IMPROVING GUIDANCE THROUGH FAST ACCESS TO INFORMATION

In business management, the details matter. It's important to understand the specifics of every transaction to provide guidance and recommendations to clients. With AgilLink, the business managers at Gursey | Schneider now have faster, easier access to those details. "We can run a financial statement and then drill down and see what comprises each line item of the statement," says Swartz. "As a result, we can help our clients better understand their expenses and make better financial recommendations."

Integration with a banking system enables the Gursey | Schneider team to track finances in real time and accelerate reconciliation of accounts. "Previously we had to go to the bank's application to look at account activity," says Swartz. "Now, for our clients banking with City National Bank, we can see that data on our screens when we log in. We have up-to-the-minute information immediately available."

A DEDICATED TRANSITION TEAM

Moving to a newer system is never without speed bumps, but Gursey | Schneider experienced a smooth transition because of the leadership of the firm's internal team and external stakeholders. "When you have someone like Jo Anne who is plugged in and is taking the lead, it's a much smoother process," says Asher Adler, Datafaction vice president and SaaS sales consultant. "Working together makes all the difference in the world for the implementation."

Ultimately, moving to the new platform has been a positive change. A modern user interface, consolidated information flows, and the ability to standardize accounts are helping Gursey | Schneider become even more efficient. These improvements are also helping the firm continue to deliver the personalized service and valuable business management insights that its clients have come to expect.



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