

# AgilLink turns in a star performance at Global Business Management

*Leading business management firm in the entertainment industry increases capabilities while reducing costs with next-gen solution from Datafaction*

It takes a company with outstanding expertise and a personal touch to provide business and financial management for prominent entertainment industry professionals, entrepreneurs, top athletes, and their families. Global Business Management (GBM) in Southern California is one of those firms. “We act as personal financial officers for high-net-worth individuals,” says David Garelick, president and CEO of GBM. “Since 1960, we’ve built a reputation for delivering the highest quality, personalized service.”

Today, delivering that service also requires the right technology solution—one that can help staff quickly respond to customer requests and streamline a wide range of functions, from paying bills and tracking income to managing projects and estates. “In our business, we need a system that reduces daily high-priority interruptions, allows rapid transition from account to account, and quickly processes high-volume and data-intensive transactions,” says Garelick.



## Challenges

- Strengthen security to meet today’s threats
- Enhance customer service and responsiveness
- Boost business efficiency and reduce costs

## Solution

AgilLink<sup>SM</sup> by Datafaction

## Results

- Cost savings of more than \$100,000 per year
- High-grade security in an off-premises data center
- Robust encryption and access controls
- Client query responses in seconds, not minutes or hours
- Secure mobile access for clients and business managers

*“After seeing the AgilLink demo, I knew right away that the services provided by this new platform would make my life easier and do great things for our clients.”*

*David Garelick, President and CEO, Global Business Management*

*“If I didn’t have AgilLink software by Datafaction,  
I’d need to have at least two more employees.”*

---

*David Garelick, President and CEO, Global Business Management*

## ADDRESSING NEW BUSINESS CHALLENGES

---

The company had been using Datafaction specialized accounting software to provide these capabilities for over 25 years. But now GBM was facing new challenges.

Bolstering security was a top priority. In the past, GBM kept the servers for its accounting system under lock and key in the company’s offices. “That is no longer secure enough—we’ve heard of servers being stolen from other service management companies by thieves breaking into offices,” says Garelick. “And then there is the ever-growing threat of cyberattacks. Security requirements have increased dramatically.”

GBM was also looking to improve the efficiency of its system to better serve clients, boost productivity, and reduce overhead. “Our existing platform consisted of two different software applications—accounting and image document management. We moved between those applications as we were working. But that slowed us down,” says Garelick. “For example, if a client called with a question about a transaction, we could not automatically access underlying documents. We’d have to go research it and get back to the caller later.”

Taking advantage of mobility to enhance client service was another big goal. “Many of our clients travel frequently and are used to the convenience of their personal mobile devices,” says Garelick. “They tend to be very visual. We wanted them to be able to log in easily from anywhere in the world and see reports or view checks for their approval.”

## SELECTING A NEXT-GENERATION SOLUTION FROM DATAFACTION

---

To meet these needs, GBM began by checking with IT and network providers about strengthening security. However, the company found that installing the necessary technology on-premises would be cost-prohibitive. “Protecting our clients’ data is an important part of our fiduciary duty, and we were determined to do it right,” says Garelick. “At the same time, we needed a solution that made sense for a company our size.”

When Datafaction introduced AgilLink, its next-generation accounting solution, GBM was quick to agree to a demonstration. “After seeing the AgilLink demo, I knew right away that the services provided by this new platform would make my life easier and do great things for our clients,” said Garelick.

## SECURING CLIENT DATA AND ASSETS

---

GBM decided to implement AgilLink, a software-as-a-service (SaaS) solution. GBM's accounting data and application are now hosted in the cloud, protected by strong access security and encryption.

All of the supporting IT infrastructure is in a highly secure location used by, among others, City National Bank, an affiliate of Datafaction. "Our clients benefit from the advanced techniques that City National employs to safeguard the system and back up the data," says Garelick. "And since AgilLink is a hosted solution, it's a great fit for us in terms of cost."

AgilLink auditing capabilities help streamline compliance with policies and regulations. The solution also enables quick identification of any compliance issues.

## STREAMLINING PROCESSES AND SPEEDING RESPONSES

---

With AgilLink, accounting and image document management are no longer separate applications. They are combined in the same platform, which enables authorized GBM staff to access any capability or information in a few clicks. "Now I can look at an account and instantly drill down on invoices, deposits, checks, or credit cards," says Garelick. "So if a client is on the phone with me, I can answer just about any question related to their financial management in seconds."

Also, GBM business managers no longer have to wait for an end-of-the-month bank statement to know an account balance—they can view it in real time with AgilLink. "We can reconcile client accounts daily, and run a financial statement for a client whenever they need it," says Garelick.

Another time-saver: when it comes to tracking payroll data for client entities, AgilLink has an interface with providers such as ADP and Paychex, so payroll data now comes right into the GBM system without the need for manual input.

## ACHIEVING YEARLY COST SAVINGS OF OVER \$100,000

---

The streamlined operations made possible by the new platform have enabled GBM to realize savings that are substantial for a firm of its size. "If I didn't have AgilLink software by Datafaction, I'd need to have at least two more employees," says Garelick. "That's over \$100,000 savings per year at a minimum. Plus, we're saving tens of thousands of dollars in yearly IT maintenance fees because the applications run off-site and the servers are fully managed."

## CAPITALIZING ON CONNECTIVITY

---

AgilLink has made a positive difference for GBM's high-net-worth clients who regularly travel, yet want to have visibility into how their money is being managed. As a browser-based system, AgilLink allows clients to securely review bills, checks, or proposals on the go. "They can take care of business anytime, anywhere," says Garelick. "So can our GBM business managers."

## ENSURING A SMOOTH TRANSITION

---

Recognizing the value of preparation in transitioning to the new system, Garelick brought in Datafaction team members for meetings with the GBM staff. "Datafaction demonstrated features on the big screen, let people play with the application, and then did a follow-up meeting for questions and answers," said Garelick. "You could see people getting excited about it, and the process went very well."

## LOOKING TO THE FUTURE

---

Datafaction is keeping GBM well informed about future plans, and Garelick sees his firm's relationship with the Datafaction team continuing to grow. "They've been a real backbone of my professional practice. It's a comfort working with a company like Datafaction, knowing it's the best out there," said Garelick. "There's no question about it—in our business, Datafaction is the industry standard. AgilLink is the latest proof of that."



## FOR MORE INFORMATION

---

Discover what AgilLink can do for your business management firm. Visit [datafaction.com](http://datafaction.com)