



## Case Study Facts:

DIGITECH SYSTEMS  
RESELLER: CASO

Document  
Management

**PROBLEM:** Needed to  
improve profitability  
and grow the business

**SOLUTION:**  
ImageSilo®,  
PaperVision®  
Enterprise,  
PaperVision® Capture,  
PaperVision® Forms  
Magic Technology,  
PaperVision®  
Enterprise WorkFlow

**RECOGNIZED  
BENEFIT:** Expanded  
offerings with a price  
competitive product  
suite and saved  
\$250,000 each year in  
management costs by  
switching to ImageSilo

## CASO Partners with Digitech Systems to Enhance Customer Service and Revenue

In 2006, CASO Document Management, a well-established document management company in New York City, was looking to expand their business in Texas and needed a team of experts who would further develop their customer base with a competitively priced offering. Founder, Owner, and President of CASO, Casey McClellan, first witnessed the sales opportunity in ImageSilo's simplicity and accessibility as a cloud enterprise content management (ECM) service, while attending a reseller conference.

"ImageSilo had all the functionality we were looking for and had the benefit of being built, tested, and in place for a decade," said McClellan. Within just a month, McClellan was able to start taking advantage of the cloud software, and very quickly adopted ImageSilo for a very large client in the financial services industry, who has now been a customer for more than 10 years. McClellan was convinced that using Digitech Systems' software and services would be more beneficial than trying to do something on their own, but it was Digitech Systems' legendary technical service and systems support that convinced McClellan to invest in the partnership. CASO signed on as a reseller, and today, they sell the entire suite of ECM products across the nation.

### Key Benefits

- Saves \$250,000 every year in hosted ECM management costs by storing customer data on ImageSilo
- Reduces implementation times to days rather than weeks
- 75% of accounts are carried over from ImageSilo—the monthly fee is so low it becomes an operational cost
- Helpful responses within 2 hours for complex problems or questions from Digitech Systems' sales team improves customer service

*"ImageSilo is designed in such a way that it makes it easy to apply customizations in a standardized way."*

-Casey McClellan, CASO, Founder, Owner, President

### Business Goal

CASO's aim was to offer a quality records management system that was customizable for client needs, and required little to no installation onsite. They needed a product suite that would be easy to sell, easy to support, and even easier to maintain. Expanding into other cities and states, CASO also needed to be able to meet the needs of numerous state and city government clients, offering millions of pages of conversions in order to increase profitability and grow their business.

### The Digitech Systems Solution

ImageSilo exceeded CASO's goal to the point where McClellan explained that "ImageSilo is a great foundational management system, because of the ease of adding more capabilities and simple integrations." Overall, McClellan is pleased that "the Digitech Systems' product suite has been very attractive in terms of price-point and ease of install." Once clients get ImageSilo up and running within a week, CASO is able to enhance each customer experience with more functionality depending on business needs. McClellan explains, "We do an in-depth assessment by going in and providing clients analyses of how they are currently storing, archiving, retrieving, etc. their content." Once a customer has ImageSilo, CASO offers to start replacing clients' forms with e-forms, then automates their business processes with PaperVision® Enterprise WorkFlow, then provides Robotic Process Automation (RPA) to automate lookups and integrations, etc. until each customer need is met.

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### RECOGNIZED

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CASO also helps  
clients convert paper  
files to electronic  
records for storage in  
ImageSilo, using

PaperVision Capture or

PaperFlow. "PaperVision® Forms Magic is another piece used by some of our AP clients to automatically sort documents into categories and extract data," says McClellan, "It's hands-off— They just buy that storage and then build it out with access to any functionality they might need, which can be setup in a matter of hours for any enterprise." Using Digitech Systems' services, CASO is able to provide on-going scanning services, because users don't need to buy additional add-ons from other vendors—they are already built for clients using ImageSilo. Having access to a complete suite of Digitech Systems' solutions has allowed CASO to help clients meet unique, complex needs; for instance, CASO has been able to help scan and store old drawings from the 1800s, and municipal finance records going back to 1780 for digital restoration.

## Business Value to CASO

ImageSilo revolutionized CASO's cloud ECM offering. As an outsourced service, ImageSilo is entirely maintained and managed by Digitech Systems, and it requires no capital investments from resellers or end users. With ImageSilo, they offer superior cloud ECM services while avoiding all the costly investments in storage servers, data center fees and the personnel needed to run a hosted storage solution, so CASO saves \$250,000 each year in management costs!

The ImageSilo pricing structure allows CASO to meet sophisticated buyer needs at an affordable price, and perform well against the competition with all the integration and workflow tools buyers expect. Most importantly, this allows them to work within budget constraints. This is why McClellan confidently says, "Once clients are using ImageSilo, 75% of accounts are carried over, and the monthly fee is so low it becomes an operational cost." Since CASO cares about providing quality service and customization for their customers, they appreciate the same service they receive from Digitech Systems; "One of my favorite parts about being a reseller for Digitech Systems is the ability to get a faster response than we do from other organizations we resale for," says McClellan. "We feel like we're important to them, because we get responses within two hours, even if they're complex, and problems will be solved within the same day of the call."

Employees previously spent an average of six months installing their own hosted ECM service, but ImageSilo is easy to install and requires very little training. Even complex solutions are usually installed in less than 30 days. The rapid implementation attracts more buyers, because it has a minimal impact on their business. City and state government clients have been drawn to this ease of use, and the customization allows CASO to meet requirements from all state image guidelines. For example, using Digitech Systems solutions, CASO is able to meet the Department of Records & Information Services (DORIS) requirements in New York City.

## Conclusion

Today, CASO successfully serves 100 Digitech Systems' clients and attributes much of their recurring revenue to ImageSilo. In fact, they like ImageSilo so much that four other offices across the US started selling it. CASO is one of the few resellers who offers full conversion and ECM services remotely, as well as onsite. They have an all-in-one capability from assessment and analysis to workflow and retrieval in as little as four weeks. Because of their exemplary growing business as a reseller, CASO has been a member of the Digitech Systems' Circle of Excellence nine times.

*"Over time, clients can add more features, such as e-forms, WorkFlow, and intelligent automation, making ImageSilo an outstanding foundation for organization, security, and accessibility of records"*

-Casey McClellan, CASO, Founder, Owner, President

*"Digitech Systems' solutions allow us to work on a case-by-case basis depending how our clients want to grow their system of record and manage their content. After analyzing what the client needs in order to grow their efficiency, control, and profitability, Digitech Systems makes it easy to suggest the next steps in ECM."*

-Casey McClellan, CASO, Founder, Owner, President