

Burgundy achieves superior customer service and operational efficiency with the help of PureFacts Financial Solutions

PROJECT GOALS

Burgundy and PureFacts began working together in 1999. At that time, Burgundy found their back-office system difficult to use and it was unable to effectively service their clients in the best possible manner. Client data was fragmented on multiple systems and it was very difficult for the firm to get a clear picture of all of the activity and profiles of their clients. Burgundy needed an integrated system that captured all of their transactions, holdings, and client relationship data in one place. This system needed to be scalable to help with a growing volume of data, more user-friendly, and needed to improve efficiency and productivity as Burgundy wanted to grow without increasing employee headcount.

KEY BENEFITS

The key benefit of the PureFacts system is that it gives employees the ability to view all of the client data they need at the click of a button. Since this data is now always readily available, the firm is able to provide superior customer service. Furthermore, this system allows Burgundy to grow their business without adding additional people to manage administrative tasks. In addition, the system was found to be very user-friendly, and now virtually every employee at Burgundy has the solution on their desktop and uses it on a daily basis to respond to clients needs and handle many other administrative tasks. What started as a system to automate a few manual processes has evolved into a complete CRM system that is now an indispensable part of Burgundy's IT infrastructure.

WHY PUREFACTS?

PureFacts has a ten-year track record of success in developing software solutions for the financial services industry. Purefacts combines its expertise in developing software with an in-depth understanding of the financial industry. While working with their clients PureFacts is able to provide relevant, insightful suggestions and can help steer its clients in the right direction. "PureFacts brings new ideas to the table that help us service our clients better," said James Meadows, Vice President of Burgundy.

PureFacts also provides a high level of customer service that Burgundy has found to be very responsive and flexible. Whether through online help or on-site visits, PureFacts is committed to providing unparalleled, long-term customer service, support, and maintenance.

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CLIENT OVERVIEW



Industry: Financial Services

Location: Toronto, Ontario

Employees: 60

Web Site: www.burgundyasset.com

Burgundy Asset Management Ltd. is a leading investment counselling firm providing discretionary investment management services to private individuals, charitable foundations, endowments and pension funds. The firm stresses independent research in the careful assessment of the economics and management of individual companies, and invests for the long-term in outstanding businesses that are attractively priced.

- Burgundy's Assets under Management per employee has increased 250% since 1999
- Burgundy has achieved a 98% customer retention rate

Franca DeBartolo, Vice President, said, “We have never been let down by PureFacts.”

IMPLEMENTATION PROCESS

The process to implement this system at Burgundy was on time and on budget. PureFacts prides itself on offering fixed-price quotes and detailed project schedules that are stringently adhered to.

FUTURE PLANS

Moving forward, Burgundy remains committed to its relationship with PureFacts as a key technology partner. The PureFacts system will play an even more integral role in the future growth of Burgundy. Future plans include greater automation, enhanced business intelligence tools, the development of the “Beaujolais” client interface, and the adoption of the PureFacts system for the U.S. marketplace.

ABOUT PUREFACTS

PureFacts has a ten-year track record of successfully developing information management software to keep businesses responsive and nimble – both today and tomorrow.

We do much more than design and sell software. We bring CEOs and CIOs together through access to high quality, reliable and useful information on every aspect of operating and financial performance. When finance and information technology teams talk in terms both can understand, information quality improves – as does the ability to manage the enterprise.

This is where we come in. Not only will we help you build bridges within your business using collaborative tools everyone understands, but we’ll also show you a healthy and consistent return on your investment.

“We would have had many more employees in our back-office today if we had not implemented this system. It has allowed us to improve the over-all level of service to our clients because information is now readily available in one central place.”

- Franca DeBartolo, Vice President



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