



MTBT helps boost productivity, slash outside printing costs for Cedar Brook Group

Background

The Cedar Brook Group provides financial services for individuals and corporations across the medical, education and business sectors. Advisors offer customized, personal solutions such as comprehensive wealth strategies, investment and insurance advice, retirement plan consulting and group benefit programs. In a process known as The Humanity Factor™, the firm and its advisors partner with individuals to honor them as the central figures in their own planning. The privately-held firm founded in 2005 and headquartered in Cleveland, Ohio, also operates offices in West Bloomfield, MI; Palm Beach Gardens, FL; and Bonita Springs, FL.

Challenge

Cedar Brook Group advisors, associates and personnel depend on its office equipment to work properly and reliably in order to maintain productivity. Before partnering with MT Business Technologies, Inc., the firm was two years into a four-year contract with a company that provided unreliable multifunction devices. Most of machines did not function properly and one did not work at all.

“We couldn’t get the existing company to fix them, CEO William Glubiak said. “We didn’t really know where to turn.”

Glubiak remembers employees continually wasting time and efforts. The four machines and entire network would stop working for days at a time, bringing the whole business to a stop. Technicians serviced the machines, but they did not carry an inventory. This meant lengthy trips to purchase parts or waiting days for a part to be ordered. The breakdowns prevented employees from completing daily tasks. When machines were working, print jobs would be incomplete.

“Employees became unproductive and less than satisfied,” Glubiak said.

The Cedar Brook Group faced a major internal problem. Throughout the first two years of the contract, Glubiak met with the previous company representatives dozens of times to resolve the issues but nothing was resolved.



“Ultimately, their entire printing process was in disarray,” said Kraig Hoffmann, MT Business Technologies Sales Manager. “There were ongoing problems with the reliability of equipment.”

Solution

The Cedar Brook Group worked with MTBT to resolve its office equipment issues. In February 2015, MTBT looked at the company’s throughput and the amount of volume each device was producing. The office flow plan and workflow were also considered. Cedar Brook’s Office Manager Diane Siedlecki and Director of First Impressions Shannon Oddi were instrumental in providing MTBT with a full scope of the office’s printing, scanning and copying demands.

“Instead of having two-medium sized machines and two small machines, we suggested installing two high-output devices strategically throughout the office to handle the day-to-day workflow,” Hoffmann said. MTBT also suggested a high-end device with PMS Color Matching capabilities.

Hoffmann reviewed the benefits of MTBT’s program with Glubiak.

“We told the MTBT story,” Hoffmann said. “I explained that we are a family-owned organization with a strong history and a focus on customer service.”

MTBT provides levels of customer service with field and help desk personnel, a service management team and trainers. Glubiak agreed that working with MTBT would be an improvement. MTBT also educated the Cedar Brook group on how to exit the firm’s existing contract.

“They gave an excellent solution that didn’t cost us anything additional than our existing contract,” Glubiak said.

Removal of old devices and installation of new devices took place on an established timeline. By April 2015, the three new Ricoh multifunction devices were installed.

MTBT focused on properly training Cedar Brook’s heavy users. Key users in each department received concentrated training. Subsequently, they confidently trained their colleagues alongside MTBT experts.



MTBT's delivery employees, installation technicians and trainers were crucial in the successful implementation of the new devices.

Results

The new machines worked well immediately upon installation.

"This is a feather in the cap of MTBT," Glubiak said.

When the high-quality machines supplied through MTBT have occasional issues, repairs are made exponentially faster than they were under the old contract.

"MTBT has a whole inventory of parts," Glubiak said. "It went to a 2-, 3- or 4-day process to a 10- or 15- minute process." This was a significant change for the Cedar Brook Group.

"The fact is we are there to follow up, respond and get them back on track right way" Hoffmann said.

The workflow for Cedar Brook's financial planners has drastically improved. Employees no longer battle interruptions in their printing and copying capabilities.

The Ricoh high-end color device allows personnel to print and bind client viewbooks in the office. This represents a significant savings over previous outside printing costs.

Glubiak has evidence that the Ricoh devices continue to work well.

"Before I had numerous people per day coming in to talk to me about the printers," Glubiak said. "Now I have no one coming to complain. That is the tell tale sign that things are working well."

Glubiak also appreciates the friendliness of MTBT employees.

"All of the MTBT people are pleasant to deal with," he said. "They are nice people when they are in here."



Glubiak plans to renew Cedar Brook's contract with MTBT.

"My experience has been very positive from a workflow standpoint," he said. "The machines actually work and they are fixed almost immediately."