

IMA Financial Standardizes Their Digital Document Solution with Foxit

IMA Financial Group

Dave Buttram, Director of Business Solutions at IMA Financial Group, was actively looking for the right PDF solution that could meet their business needs and enhance their workflow processes. As the 6th largest independently owned broker in the United States, it's a known fact that IMA Financial handles massive amounts of documents both externally and internally for their clientele.

With such a large client base, having the right PDF solution was a definite must. IMA was looking for a way to reduce the number of applications they were using by finding the right product that could meet all their needs.

Foxit PhantomPDF replaces four other PDF editors as the sole solutions provider

Prior to switching to Foxit, IMA Financial was handling their documents on four different PDF platforms. They used Cute PDF Pro to create PDF documents from Microsoft Office applications, but it only allowed them to edit in a limited format to their existing PDF docs. Adobe Reader was always a part of their environment, so they used Adobe Acrobat as well. However, Adobe Acrobat was just too expensive for the full functionality that they needed. Nuance Power PDF provided much less features, and was less intuitive for their employees to use.

After testing out Foxit PhantomPDF, they found that Foxit's PDF technology was the perfect package that combined all the features they needed in a single platform. Foxit PhantomPDF was the solution that addressed all their diverse PDF needs, and at an affordable price.

IMA Financial is the 6th largest independently owned broker in the United States. They are a hundred percent employee-owned, with nearly 700 associates in Colorado, Kansas, Michigan, and Texas. IMA Financial is a financial services company that focuses on protecting the assets of its widely varied client base through insurance and wealth management solutions.

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foxit

Easy Deployment and Seamless Support



"I have nothing but good things to say about the support we received from the Foxit PhantomPDF team. They've been instrumental in helping us to use the software in the most efficient way to fit our needs."

- Dave Buttram, Director of Business Solutions at IMA Financial Group

IMA Financial needed PDF editors for multiple departments to use, including their Property Casualty, Small Business, Benefits, Accounting, and HR departments. Foxit's PDF installer could be customized to enable or disable any functionality that was necessary, which made it simple to deploy and manage over multiple locations. On top of the easy deployment, the Foxit PhantomPDF team was there every step of the way through monthly meetings to discuss any challenges or concerns they might have had.

The consistent look and feel of the platform made training their employees seamless, and Foxit was made compatible with their existing legacy and current software platforms within their environment, sealing the deal.



"With the help of the Foxit team, the migration was very smooth. The familiar Microsoft Office type interface made training and transition utilization a breeze."

- Dave Buttram, Director of Business Solutions at IMA Financial Group

Return on Investment

The hidden financial benefits from switching to Foxit PhantomPDF was substantial for IMA Financial. They were able to reduce training costs by providing their employees with a single platform to manage their PDFs. They reduced data entry costs by being able to edit, redact, OCR, convert to Microsoft Office, and create forms. Foxit's PDF Printer enabled them to virtually eliminate paper costs by converting documents directly to PDF, instead of printing physical papers and then scanning to PDF. Document comparison capabilities in Foxit helped IMA Financial improve compliance in their documents as well.

By reducing their PDF applications from four to one, IMA Financial saved not only in costs but also in the time spent processing their digital documents.



"Converting to Phantom PDF for all our PDF needs has been one of the best moves that I think we've made."

- Dave Buttram, Director of Business Solutions at IMA Financial Group