

# Smarsh® Customer Story



## Customer Profile

McLaughlin Ryder Investments, Inc. helps individuals and institutions achieve their financial goals, with a focus on providing expert and ethical investment advice with integrity and first-class personal service.



**McLaughlin Ryder  
Investments, Inc.**

## McLaughlin Ryder Saves Time with the Smarsh Professional Archive

### Challenge

Michelle Glicklin is responsible for the compliance initiatives at the firm, including the need to archive and retain email communications. “I am the onsite IT person, and I manage the finances, operations, and compliance,” said Glicklin. “Email is such an important, vital piece of business these days – and with our previous provider, I was constantly on hold, or directed to a different person. I couldn’t get what I needed from customer service, and my searches were very slow.”

### Solution

While several solutions were considered, Smarsh was chosen due to its positive industry reputation and comprehensive archiving solution. Glicklin now spends less time on her email review using the Smarsh Professional Archive. “I would get a lot of junk emails in my random searches that I would have to wipe out, and moving from one screen to the next when reviewing email was cumbersome.”

### Outcome

Glicklin feels she receives excellent customer service at Smarsh. “Everyone has been instantaneously responsive,” said Glicklin. “The longest I have ever been on hold with Smarsh is two minutes – meanwhile, I’m still trying to resolve outstanding problems with our previous solution and getting nowhere,” Glicklin said. With Smarsh, Glicklin can view everything in one simple screen, and ensure that junk emails are removed from her searches.



Smarsh® is the recognized global leader in electronic communications archiving solutions for regulated organizations. The Smarsh Connected Suite provides innovative capture, archiving, e-discovery, and supervision solutions across the industry's widest breadth of communication channels.

Scalable for organizations of all sizes, the Smarsh platform provides customers with compliance built on confidence. It enables them to strategically future-proof as new communication channels are adopted, and to realize more insight and value from the data in their archive. Customers strengthen their compliance and e-discovery initiatives, and benefit from the productive use of email, social media, mobile/text messaging, instant messaging and collaboration, web, and voice channels.

Smarsh serves a global client base that spans the top banks in North America and Europe, along with leading brokerage firms, insurers, and registered investment advisors. Smarsh also enables federal and state government agencies to meet their public records and e-discovery requirements. For more information, visit [www.smarsh.com](http://www.smarsh.com).



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