

# Customer Success Story - Allied Investment Group



ALLIED INVESTMENT GROUP

*"Not only did this product deliver on the promised benefits, it exceeded our expectations because the team at X-FilesPro integrated the new features in their upgrade roll-out. We could not recommend this product more highly."*

- Robert Stevens



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**Company:**  
Allied Investment Group

**Location:**  
Sydney NSW

**Objective:**  
Provided storage facility for huge number of files and accommodating for all the compliance issues, by delivering promised benefits and integrated solutions.

**Solution:**  
Automated protection  
Compliance Threat  
Intelligence

**Impact:**  
Depreciation in storage cost from Salesforce Storage, through enabling external storage solution. Integrated solution for critical compliance issue. The beneficiary solution for complicated data location, file paths, and naming protocols. Enriched security solution and promised benefits

## The Objective

Secured File Storage & Compliance Solution

Allied Investment Group with years of combined experience in Wealth Management, Financial, Mortgage & Property Services contribute to each individual's financial success. Founded in 2005, Allied Investment Group's mission is to contribute to a person's financial success with integrated Wealth Management, Financial, Mortgage & Property Services. Allied Wealth Pty Ltd provides financial planning advice as a corporate authorized representative (338115) of Synchron AFS License 243313. Allied Capital Pty Ltd holder of Australian Credit Licence 390299.

Prioritizing effective user engagement Allied Investment Group successfully grabbed the market with unique visitors. In this way, they are transforming the company's name from just a brand to a known brand. Their clients are investing using a range of structures, Self Managed Superannuation, Personal Investments, Family Trusts, and Companies.

As the customer base has increased and the internal infrastructure support has expanded, all the sensitive data become progressively more vital. Owing to this there was some serious compliance issue, along with urgent data storage requirements. XfilesPro promised benefits and integrated solutions have made it easier for Allied Investment Group.

*"We choose XfilesPro to integrate our huge data and hence, speed up our response."*

- Michael Bowling

## The Solution

### Automated protection and Compliance Threat Intelligence

The entire business is built around Wealth Management, Financial, Mortgage & Property Services, hence, there was complicated data storage requirements in terms of data locations, file paths and naming protocols, along with critical compliance issue.

We decided to explore XfilesPro, as an integrated external file storage solution with security response and compliance detection process, because effective security helps drives business and enhance customer experience.

XfilesPro's file storage solution stood out for us and proactively delivered results. The journey of Xfiles can be summed up, as the one from, conviction to accomplishment seamlessly. A close fit for Allied Investment Group infrastructure with a better response to the critical compliance issue.

***"The brand is all set to move on to the next level with a well-planned competitive stand backed by the professional delivery approach."***

- Michael Bowling



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## The Result

### Better security, response and customer experience.

Almost immediately XfilesPro helped us with the huge amounts of data which exceed the Salesforce limits and the extremely critical compliance issue. Now we have a seamless process so we can get it down to a rapid and efficient working model.

"We'd been looking for an app that specifically connected our Sydney S3 drive to the Salesforce record as we hold huge amounts of data which exceed the Salesforce limits. Our businesses are heavily regulated so compliance was critical too. Not only did this product deliver on the promised benefits, it exceeded our expectations because the team at X-FilesPro integrated the new features in their upgrade roll-out."

***"XfilesPro is a step to the future and a promising move towards an intention to serve more customers with high-quality solutions."***

- Michael Bowling