Birch

"Our clients and investors can click one button and have any number of permitted files sent to their hard drive at once."

— **J. Bruce Ricciuti**, President, Birch REA and Managing Director, Birch Capital

Customization and flexibility yield the right online file sharing solution for Birch companies.

The people at Birch REA and Birch Capital LLC in Boston have very high expectations for secure online file sharing.

They turned to Onehub because their original file sharing program had severe limitations in both customization and ease of use, according to J. Bruce Ricciuti, President of Birch REA and Managing Director of Birch Capital. Clients frequently had login and usage problems, and Birch didn't have the ability to customize and control user permissions at the level that they wanted in order to protect confidentiality.

By contrast, Onehub offers them the ease of use and deeper customization and control Ricciuti desired, as well as productivity features that enable Birch to deliver vital information quickly, securely and professionally to investors, employees and clients.

Onehub brings control, customization and productivity

As an organization, Birch is actually two groups in one: Birch Capital, a specialty real estate finance group, and Birch REA (Real Estate Advisors), a services firm that offers real estate advisory, consulting, and valuation services to financial institutions, corporations, investors, developers, and others.

Both groups use Onehub to automate the flow of information via document sharing. They run 20 to 30 workspaces at a time, organized by project or investment and accessed only by approved individuals. Using a single Birch login page, both groups provide multiple client portals into the same Onehub-hosted service.

On the Capital side, Birch gives investors quick, easy access to deal rooms where they can find terms and financial information, videos, photographs, site and building plans, and legal documents pertaining to the

project they are reviewing and considering.

On the REA side, staff and clients download and upload in-progress real estate files, work with on them online, and track who's been doing what along the pipeline.

Managing user permissions is critical for both groups: most project information, and sometimes even activity, must remain confidential. For example, their Capital group must be able to keep each investor's interest in an opportunity confidential from others. "Limitations with our previous tool got us into some very embarrassing situations around this," explains Ricciuti. "But with Onehub, we can customize who we send our information to, how we receive information back from them, and whether everyone has visibility into everyone else's activity."

Other control features of Onehub let Birch easily present a professional look and user experience that's unique to each project. For example, the REA

group adds a client's logo into the client's online workspace, customizes the welcome (home) page, and sets up file structures and user permissions specific to each client. Through Onehub "white labeling," Birch has replaced the default Onehub identity with their own brand throughout all their workspaces, including the hosted domain name.

Switching to Onehub greatly improved their customers' experience in other ways, too. "With the previous program, we constantly got calls about login and account setup problems, and how to use the file sharing. Onehub applies the same kind of file and folder navigation that people use every day, so clients catch on quickly without any help," says Ricciuti.

Another top benefit for Birch is the time they save by uploading information only once, then having it available for fast access. "Our clients and investors can click one button and have any number of permitted files sent to their hard drive at once—NDAs, loan documents, huge photos and environmental documents, and so on."

Combine Onehub's ease of use, fast and efficient online file management, and professional customization features for control, and it's no wonder that Ricciuti concludes, "I would recommend Onehub without any doubts."