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FOR IMMEDIATE RELEASE

AQUA FINANCIAL SOLUTIONS NOT TREADING WATER

If you are looking for an industry in which paperwork is continually generated then you would be hard pushed to find one to rival the financial services sector. It is also one of the most competitive, where customer service is key and can be the difference between retaining and losing a client. Indeed Aqua's reputation for delivering clear, current, independent advice backed by customer service excellence is something they take very seriously as well as being one of the financial services' primary areas of focus this year with the 'Treating Customers Fairly' initiative.

Certainly, for a successful and growing company like Aqua Financial Solutions, that has been advising their clients for many years on all aspects of financial planning, having immediate access to customer files has been paramount to maintaining the service excellence with which they have long been associated.

To ensure this level of service as the company continues to grow requires that all Aqua's client facing systems be as scalable as possible. The decision was taken, therefore, to transfer all of their client files to an online system so that they could be integrated with the rest of their clients' information and documents. Having all of the information together and accessible online allows immediate access and ensures speed of response.

Due to the confidential and precise nature of the data, this meant careful scanning and indexing of all their client files. Aqua selected Preview to partner them in this on the basis of their reputation in the field and their ability to offer all of the elements that Aqua were looking for both in terms of scanning and indexing, as well as the secure storage of the files.

The scanning was done in conjunction with Preview's state-of-the-art Records Management Centre where the paper records were archived once scanning had been completed. The electronic files were then indexed to replicate the original file folder structure in Aqua's internal system which uses the Quay Software Document Management system. This meant the digital files could be easily integrated with the files already held in the system making both filing and access as straightforward and quick as possible.

"Above all," commented Carolyn Bennett, Director at Aqua Solutions, "it was the flexible approach and the ability to handle secure data at Preview that really made

the choice simple for us. We had specific requirements for the scanning and indexing to fit with our own systems and Preview was able to deliver that for us.”

Now that the past records are scanned and in place, the job of maintaining the information with new files is a simple one with new files scanned and stored on a regular basis to keep the client files up to date. With their business continuing to grow through recommendation and word of mouth, Aqua Financial Solutions look likely to keep both themselves and Preview busy well into the future.

About Preview Services

Preview Services Limited (www.previewservices.com) is a specialist provider of outsourced document management services to businesses and public organisations of all sizes. Clients include major sales and leasing companies, airlines, engineering firms and government agencies.

Based in Feltham, Middlesex the Company operates one of the UK's leading document scanning bureaux and is developing innovative and cost saving solutions for document management.

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About Aqua Financial Services

Aqua Financial Solutions (www.aqua-solutions.co.uk) has been advising clients for many years on all aspects of financial planning. For advice on all your financial planning needs, Aqua can be contacted at:

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