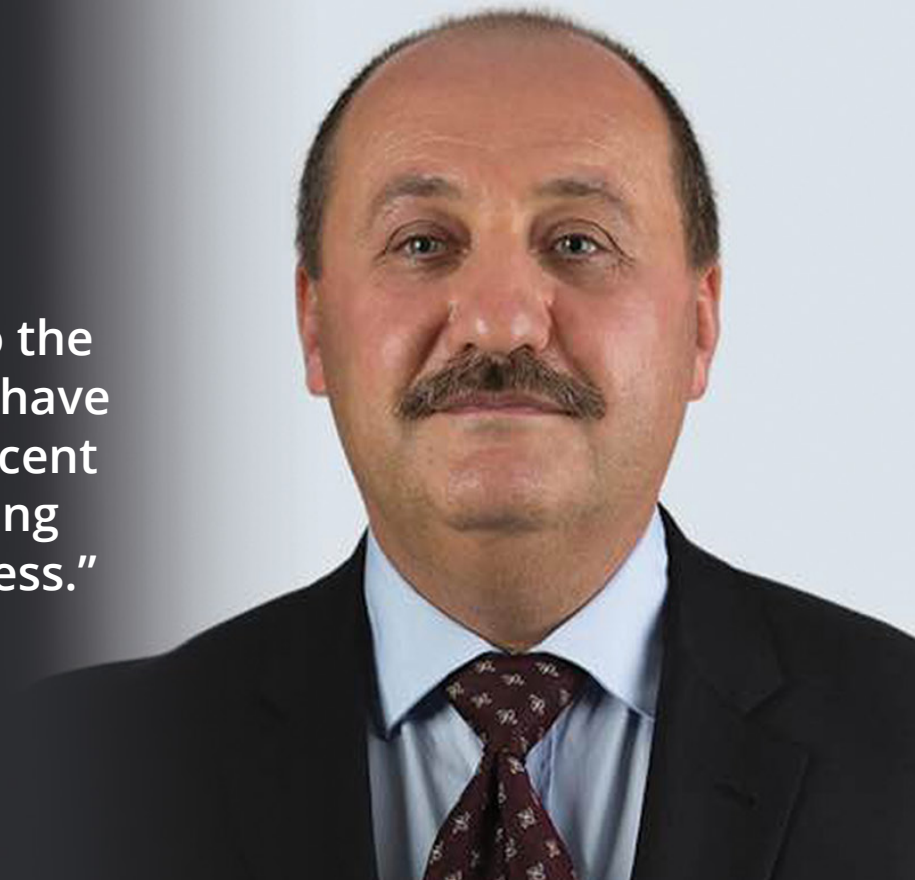


CUSTOMER STORY

RFA

“Cognition360 reporting is very deeply integrated into the company’s operations. We have seen at least a 15 to 20 percent benefit in terms of increasing efficiency across the business.”

Grigoriy Milis,
Chief Technology Officer, RFA



Cognition360 reporting drives a 15-20 percent increase in efficiency for RFA

When RFA determined it needed to upgrade to a proper, comprehensive ConnectWise reporting solution to get the data visibility it needed to drive continuous improvement, growth, and expansion, the search led to Cognition360. After just over a year of using the product, Cognition360 is now firmly integrated into RFA’s operations, and the company has seen at least a 15 to 20 percent increase in efficiencies across the business.

RFA – Richard Fleischman and Associates, Inc – is a global IT, financial cloud, and cyber-security provider to the financial services and alternative investment sectors. Founded in 1989, today the company has over 250 people working from regional headquarters in New York and London, and in offices in the

United States, Europe, and Asia. The company is operationally mature, with a complex range of products and services, and clients.

RFA has used ConnectWise as its PSA for ‘a very long time’, says Grigoriy Milis, RFA’s Chief Technology Officer. “Over the years, we developed ad-hoc reporting on an as-needed basis. But as the business grew, we realized that to develop a comprehensive set of operational, financial, productivity, and project management reporting across the entire company, we would need an army of business analysts to work on it! Without proper reporting, we couldn’t manage the company very well, and we couldn’t continue to efficiently grow and expand our operations.”

RFA researched what reporting was available for ConnectWise and found Cognition360 on the ConnectWise Marketplace Partner Exchange.

The free, no-obligation trial was an immediate positive for RFA, Milis says. "We did a trial, and it became quickly apparent that it's a very comprehensive product and easy to deploy, and Cognition360 was willing to make adjustments for our reporting requirements. The price point also made sense. So, we decided to go ahead."

Cognition360 was implemented at RFA in July 2021, a process that was very quick and simple, Milis says.

Saving money and boosting productivity

In the first year of using Cognition360, RFA has seen significant financial and productivity gains:

rely on Cognition360 reporting to see the statistics and identify our top five types. Then we focus on the tasks these tickets cover to see how we can do them quicker and in a more automated way. Off the top of my head, we have seen at least a 15 to 20 percent benefit in terms of increasing efficiency across the business."

Quick, professional support

"Our interactions with Cognition360 have been great," Milis says. "When we engaged, Cognition360 was very willing to accommodate our requests for the trial. For the onboarding, we had a dedicated project manager to guide us, who conducted training

"We're very happy – it's a really helpful tool. Every department uses some reporting function of Cognition360. It gives us very clear visibility into a wide range of operational parameters. Cognition360 was a good win for us."

Grigoriy Milis, Chief Technology Officer, RFA



"We've definitely seen productivity gains," Milis says. "Financially, if we had to build the same type of reporting for the company, we probably would have to spend three times as much money on labor just to do it ourselves."

"The big benefit to the company is that we were able to get the set of reporting that we required very quickly – out of the box, and it covers a wide range of operational parameters – or KPIs and metrics – across the different departments. We rely on this very heavily. For example, our support teams rely on the productivity reporting, and utilization reporting. This reporting drives not just the KPIs for tech utilization but also drives our hiring decisions, and our expansion decisions. Cognition360 reporting is very deeply integrated into the company's operations."

Increased efficiency business-wide

RFA is using Cognition360 reporting to identify the metrics it needs to increase efficiencies across the business, Milis says.

"This is true for every department. If the manager or director of a department requests specific information, we rely on Cognition360 reporting to validate the request. We use the insights that Cognition360 surfaces up to optimize the efficiency of our departments. For example, when we investigate the types of tickets that we're servicing for clients, we

for each department, for different types of reports. Because it's a hosted solution, it's been easy to use. The stability of the data ingestion has been great. We haven't experienced any issues – it just works. Since the initial onboarding and work on getting the data right, we haven't needed to go to Cognition360 much for support, but when we have, the response is always good – very quick, very professional, and our requests are resolved promptly. We're very happy – it's a really helpful tool. Cognition360 was a good win for us," Grigoriy Milis concludes.

About RFA

RFA is a global IT, financial cloud, and cyber-security provider to the financial services and alternative investment sectors. The company takes pride in redefining the future of technological support. Through its R&D, DevOps, automation, and machine-learning capabilities, RFA provides clients with customized workflow and IT strategies to bring tomorrow's edge, today. RFA has regional headquarters in New York City and London (EMEA), with offices in the United States, Europe, and Asia. Serving over 800 clients globally, RFA brings together a seasoned executive team and over 250 highly skilled consultant technicians to provide clients with best-in-class technology solutions and automated business processes, supported by expert staff 24/7/365. See: www.rfa.com

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