



“Try our easy-to-use
and secure Virtual
Data Rooms.”

– Jarrett Horne
Director, ShareFile VDR

Customer Name

Forbes Mergers & Acquisitions (M&A)

Industry

Financial

Location

Parker, CO

Number of Employees

9

Business Challenge

- Other products overcomplicated
- Constant technical issues with prior systems
- Security & permissions lacking

Business Results

- Ease of use
- Secure access 24/7
- Eliminated 3rd party technical support costs

How Forbes M&A Streamlines Operations with ShareFile’s Virtual Data Rooms

Forbes Mergers and Acquisitions is a transaction advisory firm with a core focus on mergers and acquisitions in industry sectors that are underserved by the medium to large investment banks. Forbes also provides valuations and other financial and strategic advisory services.

Business Challenge

Before ShareFile, the firm experienced constant technical and user training issues with remote access and backup of its internal file system.

The firm was challenged by overcomplicated user provisioning and interfaces of other virtual data rooms. “Other products were not intuitive, overly complicated, and most vendors tried to ‘reinvent’ file sharing. We couldn’t afford for our users to be a part of the changing way they store and share files,” says Bob Forbes President of Forbes M&A.

Business Results

Currently, Forbes M&A uses ShareFile as its intranet and virtual data room extranet. Employees benefit from the ShareFile Desktop Sync tool, which allows automatic synchronization of files to the ShareFile system.

The firm uses the web interface for secure access from other remote computers and for third party user provisioning and access. Bob says the most important benefit for the firm is ease of use. “We eliminated third party technical support costs and user support headaches once we implemented ShareFile,” says Bob.

“ShareFile removed annoying, time consuming user training, support and debugging. It is simply highly intuitive and reliable,” says Bob.