

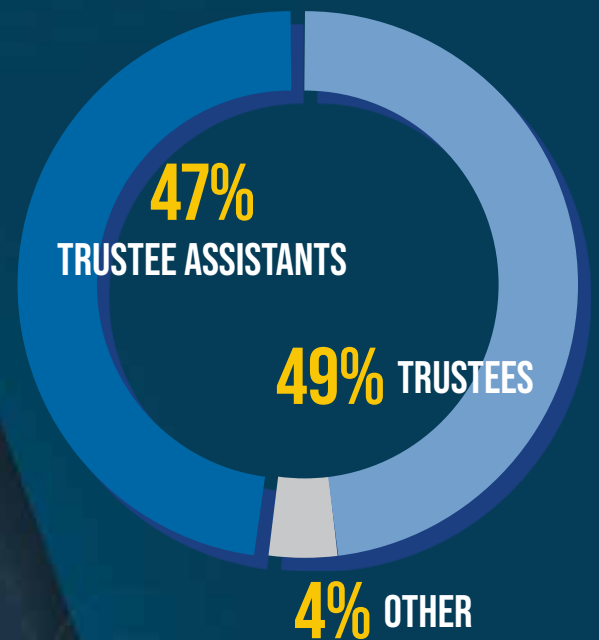
2024 TRUSTESOLUTIONS CUSTOMER SATISFACTION SURVEY REPORT

ABOUT THE 2024 TRUSTESOLUTIONS CUSTOMER SATISFACTION SURVEY

The annual TrusteSolutions (TES) Customer Satisfaction Survey received a record number of responses from customers this year. The online survey opened November 5, 2024, and closed November 22, 2024. The data has been tabulated and results are shared here. As always, we thank our customers for their honest and candid feedback.

Responses were collected from an almost even split of Trustees and Trustee Assistants that are existing TrusteSolutions customers.

SURVEY RESPONDENTS:



"Been using various Trustee software for 25+ years and TES has been the best as far as features, updates, and support!"



*"TrusteSolutions makes the Trustee world **E-A-S-Y!**"*

NOTEWORTHY GROWTH IN 2024

NEW CUSTOMER ACQUISITIONS:

TrusteSolutions **grew its customer base by 13% in 2024, more than doubling its growth from 2023.**

Nearly half of its newly acquired customers are New Panel Trustees.

With a loyal base of customer advocates, it is no surprise that over 50% of New Panel Trustees choose TrusteSolutions.

At TrusteSolutions, we are customer obsessed. We listen to our customers, assist our customers, and are rewarded with their loyalty. We are proud to say we have customers that have been with us since the company's inception.

GROWTH
13%

2023

2024

“

"I do not feel like a customer; I feel like family. Everyone knows my name when I call, and everyone is super friendly and extremely helpful."

“

"The software is definitely a step up from our previous provider. Much more user friendly."



FAVORITE FEATURES MENTIONED BY:

NEW PANEL TRUSTEES

Ease of use
Reminders
Customer service
Cloud-based

RECENT CONVERSIONS

Reporting
341 prep
Daily document review
Case Analytics to fix errors prior to TIRs

Recent **CONVERSIONS** recommend TrusteSolutions for its **DOCUMENT PORTAL, SUPPORT,** and **WEB-BASED ACCESS.**

KEY TAKEAWAYS

Satisfaction runs high among all TrusteSolutions customers, whether referring to the software, TIR results, or customer support team. Some specific takeaways we learned from this study include:

- ✓ **EASE OF USE** and **ACCURATE REPORTING** were overwhelming winners when customers shared their favorite part of the TrusteSolutions software.
- ✓ **100%** of respondents stated they are **SATISFIED** with their **TIR RESULTS**.
- ✓ Chapter 7 Trustees unanimously found the TrusteSolutions Trustee Interim Report (TIR) Prep features **LED TO MORE ACCURATE TIR RESULTS AND FEWER ERRORS**.
- ✓ **100%** of respondents stated they are **SATISFIED** with their **CUSTOMER SUPPORT TEAM**.



MORE HIGHLY RANKED SOFTWARE FEATURES CUSTOMERS VALUE

In addition to ease of use, customers described their top favorite feature as user-friendly and easy to navigate. Accurate reporting was a close second. Other favorite features customers mentioned include:

Excellent and responsive customer support



Efficiency of 341 meeting processing



Accessibility from anywhere
on any mobile device



Entire TIR process including pre-TIR
assistance and TIR accuracy



WHAT OUR CUSTOMERS ARE SAYING

“

*"The software is **easy to use** and assists in catching issues in reporting that may have been missed."*

*"All of it! Great software to begin with. **Constantly updating.**"*

*"All of the **automated tasks** it does and warnings when I'm about to mess up."*

*"**Easy to navigate** and **accurate.**"*

*"**I like the Case Analytics section.** I am the type of Trustee that is always looking at fixing errors well before interim reports and this is helpful."*

*"**Ease of use and fabulous customer support!**"*

ACCOLADES FOR BANKING PARTNERS

When customers were asked about their interactions and relationships with their banking partners, this is how they described them:



Focused on
the customer



Responsive



Attentive



Efficient

“

*"They are **on top of it always!**"*

*"**I've never had an issue.** If something arises, they assist immediately."*

*"**Quick, efficient, responsive.**"*

*"**Always attentive** to our needs."*



OUR GREATEST ADVOCATES – OUR CUSTOMERS!

Our loyal customers are also our greatest advocates, we're proud to say. When asked if they would recommend TrusteSolutions, the response received was a tremendous, "YES!" When we inquired further into exactly what they would say when recommending TrusteSolutions to another Trustee, New Panel Trustee, or Trustee Assistant, they shared these top points below:



The software is user friendly, easy to use and navigate.



You can work anywhere and access everything you need on any mobile device.



Their customer support team is excellent, responsive, and helpful.



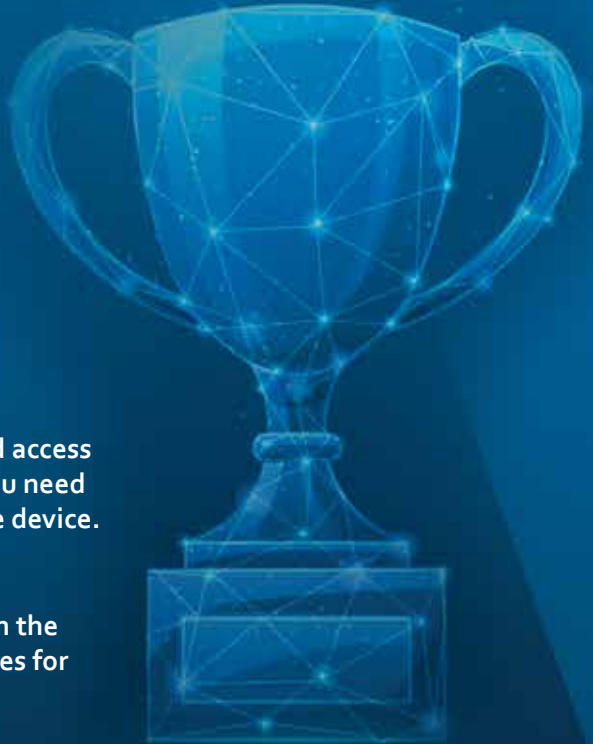
Automation in the software makes for less work.



Their training gets you up and running quickly.



"Easy to use and hands-down **the best customer support around**. They go above and beyond to train, assist, and make sure you are successful."



WHAT OUR CUSTOMERS ARE SAYING



"Yes, I would recommend TES. I used another vendor for years and thought they were great until I started using TES. It is **much more user friendly and has a great deal more to offer** in assisting Trustees and their assistants with the whole Trustee process. And TES has the greatest customer support."

"I would tell them that **there is no better system.**"

"I would tell them **I switched from another vendor many years ago and don't look back**. The software can do most anything and continues to improve."

"Absolutely! **The ability to work from anywhere**, and the fact that you are heard by staff."

"I would highly recommend TES. I would tell them that **the personal customer service is excellent.**"

WANT A PARTNER THAT DELIVERS **MORE EFFICIENCY,** **MORE EXCELLENCE, AND MORE PROFIT?**

Look no further than TrusteSolutions —
the ultimate case management platform for better
case management. Backed by the best customer support
team in the industry delivering 100% satisfaction.

**EXPERIENCE EXTREME SATISFACTION IN CASE
MANAGEMENT BY MAKING THE SWITCH TODAY.**



A division of Financial Software Solutions

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