



A division of Financial Software Solutions



CUSTOMER SATISFACTION 2022 REPORT

2022

EXECUTIVE SUMMARY

The annual TrusteSolutions Customer Satisfaction Survey was conducted online during November, 2022. Data received from this annual survey is used to assist product development with new features, prioritize plans for 2023 and ensure the highest level of product and support satisfaction among customers. The feedback received from our trustee and trustee assistant customers is greatly appreciated:



100% of respondents are highly or very highly satisfied with the software functionality from TrusteSolutions



Almost all of the respondents use the software platform daily to do their work



Software and hardware support both received high scores for prompt response times



Customer advocacy runs high among TrusteSolutions users, with 100% of survey respondents recommending TrusteSolutions to other trustee offices



As for customer growth in 2022, some of our new customers were also new panel trustees. Later in this report we share details about their satisfaction levels with the onboarding process, software, hardware and training.

SURVEY RESPONDENTS:

- ★ **86%** trustees
- ★ **14%** trustee assistants
- ★ **71%** of respondents have been customers for more than 5 years

"I have never been anything but immensely pleased with TES in the 17 years as one of your customers. Thank you for your unwavering support of me and the rest of the Ch. 7 Trustee community."

—TrusteSolutions 2022 Customer Satisfaction Survey respondent

HIGH SATISFACTION SCORES GIVEN FOR SOFTWARE, SUPPORT & TIMELY RESPONSES

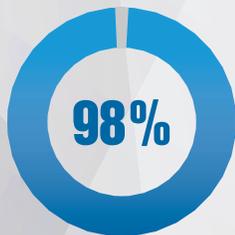
We are thrilled to report that 100% of trustee and trustee assistant customer respondents rated their satisfaction with software functionality as high or very high. While there is always room for improvement, we are pleased to learn that our diligence and dedication to delivering the most advanced cloud-based case management program to the industry has been successful. Additionally, our customer support received high or very high satisfaction ratings from 98% of survey respondents. And satisfaction with hardware and software responsiveness was confirmed by 96% and 98% of respondents, respectively.



SOFTWARE FUNCTIONALITY*

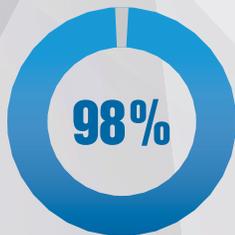
Satisfied or Very Satisfied

*An increase from last year



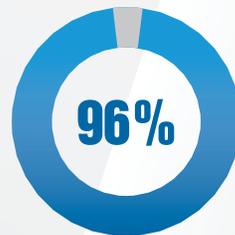
CUSTOMER SUPPORT

Satisfied or Very Satisfied



SOFTWARE SUPPORT KNOWLEDGEABLE & RESPONDS IN A TIMELY MANNER

Satisfied or Very Satisfied



HARDWARE SUPPORT DELIVERED IN A TIMELY MANNER

Satisfied or Very Satisfied

"The software is very reliable and has all the features necessary to streamline the trustee practice. It is user friendly and helps move cases along efficiently."

"Software support is excellent. TES does not stop until the problem is solved."

"The individual attention that you receive cannot be matched by the other programs that I have used."

"Rarely have problems but when I do, the issues are immediately addressed."

FAVORITE FEATURES FOR IMPROVED EFFICIENCY & TIME SAVINGS

While TrusteSolutions has many different software features designed to maximize productivity, there are three in particular that received the most mentions by survey respondents. They are:



INTEGRATED BANKING

Integrated Remote Deposit Capture saves time with same-day deposit clearing and posting without physically going to the bank



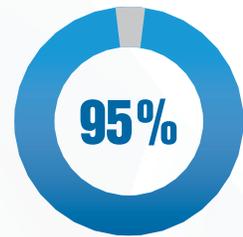
DOCKET PARSER

Docket Parser minimizes work by automating the process of searching docket entries and creating tasks for ultimate organization



BARS

Bank Account Review System accelerates statement reviews and eliminates manually flipping through statements

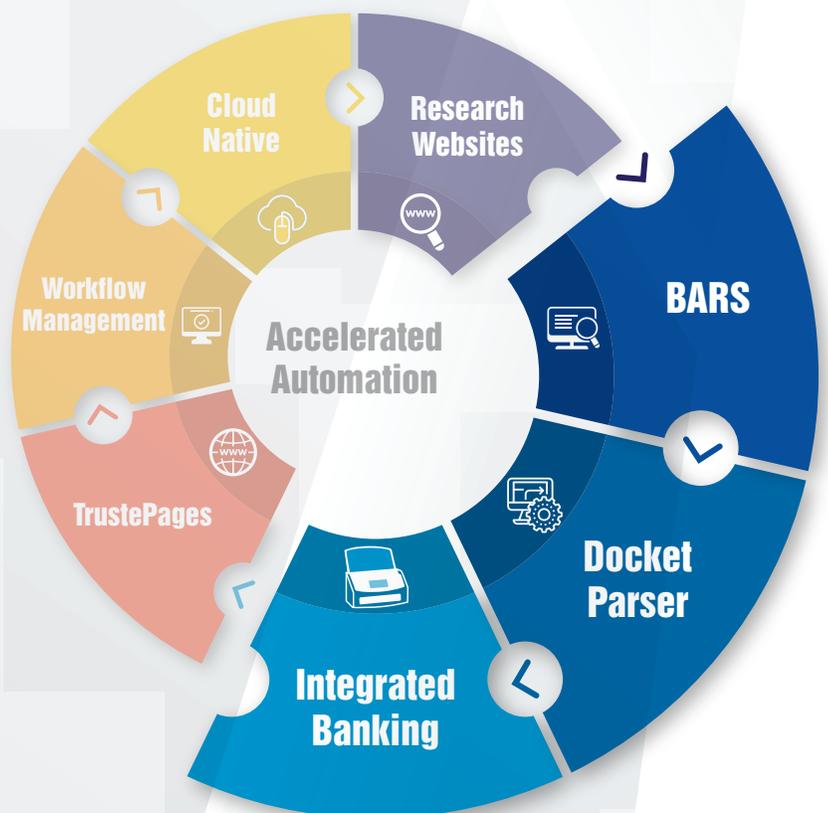


USE THE TRUSTESOLUTIONS SOFTWARE DAILY TO EFFICIENTLY DO THEIR JOBS

"The system is easy to use day to day."

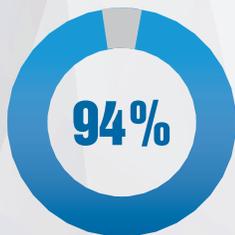
"The mobile app can be very helpful."

"Integrated banking saves time."



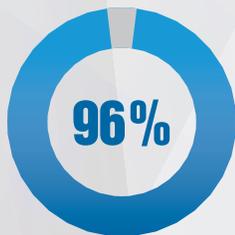
BANKING SATISFACTION RECEIVES HIGH MARKS

When TrusteSolutions customers were asked about their level of satisfaction with their bank, an overwhelming majority gave high marks in the following categories:



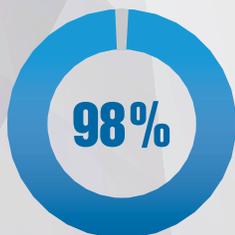
STATE THEY ARE SATISFIED OR VERY SATISFIED WITH THE BANK

"Banking services have always been very responsive."



CLAIM ANY BANKING RELATED ISSUES THEY HAVE ARE RESOLVED TO THEIR SATISFACTION

"When I call the bank I get a quick response that solves the issues I have."

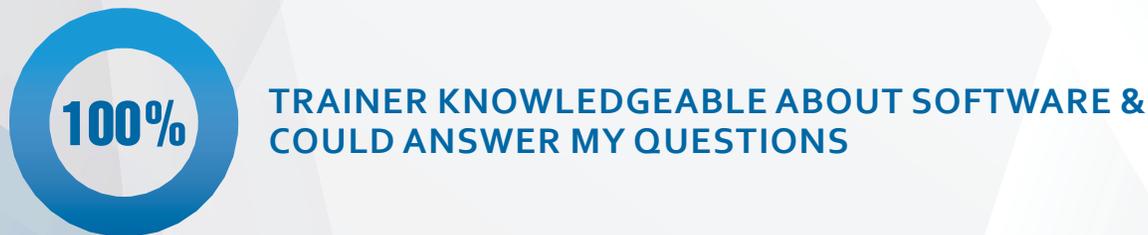


SHARE THEIR BANKING SUPPLIES ARRIVE ON TIME

SATISFACTION AMONG NEW TRUSTESOLUTIONS CUSTOMERS

We asked our new panel trustee customers how they felt their onboarding process went, including the training they received and the hardware provided. For the new customers that switched from a previous case management provider, we inquired about what TrusteSolutions tools have provided the biggest time savings to their practices. Here is what we learned:

"I know I have a true partner in TES and all the staff. I've been with other providers and IT'S NOT THE SAME in their world."



BIGGEST TIME SAVERS AS STATED BY SWITCHERS TO TRUSTESOLUTIONS:

★ CASE QUERIES

★ REDUCED DATA ENTRY ERRORS

★ AUTOMATION TOOLS

"Very happy with software, hardware and ease of use."

 **25%**

TIR & FINAL REPORTS MORE ACCURATE SINCE SWITCHING TO TRUSTESOLUTIONS

TRUSTESOLUTIONS CUSTOMER ADVOCACY

When we asked survey respondents if they would recommend TrusteSolutions to another trustee, we received a unanimous response of YES! That type of customer advocacy is the biggest compliment a company can receive — and it doesn't go unnoticed or unappreciated. Thank you to each of you for being a TrusteSolutions customer and allowing us to serve you year after year. It is our greatest pleasure.



When asked, "What would you say to another trustee about TrusteSolutions," these were some of the responses we received:

- ✓ Cloud based program works well and is extremely convenient.
- ✓ Everything works as it should. No glitches, no excuses.
- ✓ Great product, great staff and with TrusteSolutions, you will figure it out together!
- ✓ The individual attention that you receive cannot be matched by the other programs that I have used.
- ✓ Make the move...NOW!

100%

**WOULD RECOMMEND TRUSTESOLUTIONS
TO ANOTHER TRUSTEE**



READY TO ELEVATE YOUR PRACTICE? **MAKE YOUR MOVE TO THE TRUSTESOLUTIONS CLOUD.**

Long-standing leadership and superior customer ratings are top reasons why TrusteSolutions is the proven choice for cloud-based bankruptcy and receivership case management software. Built in the cloud, TrusteSolutions leads the industry with relentless innovation for streamlined case management. Users enjoy automated docket entry analysis, fully integrated banking, auto-valuation of assets, integrated trustee web pages for secure collaboration and workflow automation for maximum productivity. Backed by outstanding customer support that delivers answers when you need them and system speed like no other, TrusteSolutions, a division of Financial Software Solutions, LLC, a Houston-based enterprise-level software company, empowers attorneys to take control with confidence, saving them time – and money.

Find out the difference a cloud-native platform and outstanding customer service make.

MAKE THE SWITCH TODAY.
VISIT WWW.TRUSTESOLUTIONS.COM OR CALL 866-878-7831.