

Flexibility and security underpin professional services

INVO PEO uses ShareFile to maximize client trust and loyalty

Expertise across the spectrum

In an increasingly employee-centric working environment, having high-end HR and employee management systems in place is no longer just a 'nice-to-have' for any business. An increasingly popular option for many is to hand these responsibilities to a professional employer organization (PEO).

Based in Oak Ridge, Tennessee, INVO PEO's team includes experts across the spectrum of business services, from payroll to risk management, compliance, and beyond. With 170 staff in four states, INVO PEO operates across the US, representing over 30,000 employees.

"If you're large enough to need additional help with things like payroll but not large enough to have resources in-house, you are our ideal customer," says Tim Knight, Vice President of Operations at INVO PEO. "We're a very high-touch back-office operation that allows customers to spend more time on their core business. That's a big part of our philosophy; we're a one-stop shop."

High volumes of sensitive data

A key requirement for INVO PEO is the need to transfer large volumes of files and data securely, both between themselves and their clients. It's a task that INVO PEO first entrusted to [ShareFile](#) around 10 years ago when they embarked on a period of intensive growth and realized that their previous system was struggling.

Critically, this is often highly sensitive information; it typically includes names, addresses and personal details, bank and financial information, photographs, medical details, and other information that could cause serious problems in the wrong hands.

"We were using an FTP server process, which was clunky and full of technology problems, especially for clients that were not familiar with that kind of technology," Knight explains. "We needed a much simpler process both for our employees and our clients, and ShareFile was the perfect product to take care of those issues."



Industry
Professional Services

Location
Tennessee, USA

Products
• [ShareFile](#)

Diligence and credibility

Of the multiple tasks that INVO PEO placed on ShareFile, none is more important than security. And as cybersecurity concerns grow, so do the responsibilities placed on INVO PEO.

“Companies are looking at attacks on a regular basis and protecting important personal and financial data from identity theft is on everyone’s mind,” says Knight. “We’re very diligent about transferring and maintaining client data securely, and ShareFile’s reputation lends a lot of credibility to the level of security we provide to our clients.”

ShareFile also means INVO PEO can keep on top of additional compliance requirements such as HIPAA, and the business now uses ShareFile extensively, both internally and externally, as a secure depository of information as well as a means of transferring files to external parties easily.

“The storage capacity and level of organization of documents within the ShareFile system is a major appeal,” Knight continues. “We have a large number of internal users, and we’re also the employer of record for many client employees. We have a lot of record retention requirements, and ShareFile is a terrific repository for that information.”

A flexible, secure tool

ShareFile is now used across INVO PEO’s operations. The payroll department handles the business’s highest number of daily transmissions and uses ShareFile’s access and notification functions to manage access and organize records.

“The notifications have helped us improve our response times significantly, we are notified immediately when documents are opened, uploaded, or downloaded, leading to less time managing low-value admin work,” says Knight.

The legal team is another high-volume user, while the claims management department uses ShareFile to handle employee injury claims and manage the associated documentation and photographs. “Our legal team works with counsels across the country,” says Knight. “They all require certain levels of security, and ShareFile meets them all.”

For most staff, the ShareFile Microsoft Outlook plug-in is the go-to tool for transmitting files securely right through their email, while bookmarked links are commonly used to allow clients to access dedicated spaces within INVO PEO’s ShareFile environment.

“ShareFile is a very flexible and easy-to-use tool,” notes Knight. “If it’s extremely sensitive data, we can set links to expire after a certain period, limit the number of downloads, or add specific access control to folders and documents. It adds extra layers of security with a few clicks of the mouse.”

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Part of the workflow

As INVO PEO's services expand, the business plans to extend into new sectors and build new capabilities and service models. And ShareFile will continue to grow with it.

"We and our clients have such high trust in ShareFile," says Knight. "The uptime, the always-high level of security, the ease of use. As we spin up new companies, we need its ability to just plug in and make it part of the workflow."

He concludes: "Everyone loves ShareFile. It's become an integral part of our business and made so many tasks much easier and faster. Our employees would revolt if they didn't have it!"

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Tim Knight
Vice President of Operations,
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