

## McGohan Brabender Generates Savings with Sage KnowledgeSync

### Executive Summary

McGohan Brabender, an employee benefits consulting firm, has been a Sage SalesLogix user for many years. They continue to see business improvements as a result of growing the widespread use of Sage SalesLogix for all aspects of prospect and client management. Their most recent addition to Sage SalesLogix was Sage KnowledgeSync, an alerts and notifications tool, **and the productivity and financial savings are impressive.**

### The Challenges

McGohan Brabender was looking for efficient methods to keep client data updated and retrieve data from SalesLogix and other business applications in order to make timely business decisions. McGohan Brabender needed to:

- Deliver reports more timely and accurately to the appropriate business managers
- Keep data updated to current client conditions in order to provide reports and measure critical business metrics

### The Solution

Implementing Sage KnowledgeSync eliminated many hours of labor previously required to generate and distribute reports, along with improving the accuracy of data in SalesLogix. The sales commission report, generated monthly was a daunting task requiring nearly three days of preparation. The commission report also consumes nearly 1500 pages of paper every month. This report is now delivered to each individual producer's e-mail box in a secure, efficient, and cost reducing manner using Sage KnowledgeSync.

Updating client data in SalesLogix with Sage KnowledgeSync provides a reliable way to keep business reports and metrics accurate. When client status changes from prospect to customer notifications are sent via e-mail to engage other individuals in the on-boarding process.

### The Results

- 320 hours of labor was saved per year by automating four reports using Sage KnowledgeSync
- \$650 a year in paper and ink savings for previously printed reports
- Improved reliability of data in SalesLogix due to field audits and notifications
- Improved employee satisfaction due to timely receipt of business reports and

## McGOHAN BRABENDER

### Company Profile

For over 35 years, McGohan Brabender has helped employers select, understand and communicate their employee benefits.

As one of the largest independent employee benefits brokerage and communication firms in the country, they have the knowledge, skills, and most importantly, the people, to help employers take care of their most-valuable asset – their workforce.

### Solution Profile

#### SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

- Sage KnowledgeSync detects any business conditions that are critical to the success of your organization and triggers alerts via e-mail, fax, pager, screen pop, cell phone, and web browser.
- Automatically deliver quotes, invoices, work orders, or other documents to clients, partners, or prospects.
- Keep your applications, clients and sales reps informed. Sage KnowledgeSync can schedule an activity and assign it to the appropriate sales rep.
- Automatically process incoming e-mail messages based on defined business rules

*For more information about Sage KnowledgeSync or any other Sage CRM solutions please call SimpleSoft Solutions 937-885-1204 x3*



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