



McGohan Brabender benefits from Sage SalesLogix

Executive Summary

How does a high growth company keep up with new customer demands, manage restructure and change, and efficiently handle their data records and still remain at the top of their game? Well, if you are McGohan Brabender, then you select and implement a CRM tool that will grow with your company. The solution for McGohan Brabender, an employee benefits consulting firm, was Sage SalesLogix. The solution accommodated a quick implementation in a phased, planned approach, helping them successfully achieve their goals while continuing to easily service customers. With Sage SalesLogix and the professional customer service staff the benefits of doing business with McGohan Brabender just keep growing!

The Challenges

McGohan Brabender has been doubling their business volume every five years and wanted to make proactive infrastructure changes to allow them to keep pace with their growth rate while keeping focus on the client relationship. Their plan was to make some significant changes to their business without any interruption or compromise to customer service, while consolidating multiple systems.

- 1. Realign Sales and Customer Service Groups**
McGohan Brabender realigned their sales and customer service groups from twelve autonomous sales teams to one cohesive team. This team shares resources to provide better utilization of people skills and give more consistent service to clients. They also developed an inside customer service team trained and dedicated to resolving troublesome benefit issues for their clients' employees.
- 2. Consolidate Existing Data Systems**
The second major area of impact was in the current IT home grown applications. McGohan Brabender had customer and vendor data in three separate systems. The need for one central database with a clear migration plan was essential to success.
- 3. No Interruptions in Customer Service**
No loss of customer service was the clear direction of the partners of McGohan Brabender. CEO Pat McGohan's philosophy of doing business is to treat employees like you want them to treat your customers, and empower them to service the customer the way they believe is right. The partners and management team of McGohan Brabender knew they needed a CRM solution that would satisfy their information needs but they desired something more than a software tool - a sound, long-term strategy. They needed a flexible CRM solution that would match the way they do business; putting the client relationship ahead of everything else.

The Solution

The Sage SalesLogix Sales and Support Clients enable the entire sales and customer service team to "stay in the know" about any open client issues. A ticket can be opened by anyone on the team. The simple input screens allow team members to capture all client information, no matter how lengthy. Once the ticket has been opened the resolution process clock has started. The McGohan Brabender way is to get the claim settled with

McGOHAN BRABENDER

Solution Overview

Sage SalesLogix CRM Sales & Support Clients implemented to track employee benefits claims service advocacy and measure success in satisfying customers.

Company Profile

With over 400 years combined experience in managing employee benefits, McGohan Brabender, Inc. provides group insurance brokerage/account management/benefit consulting services to companies of all sizes.

Business Situation

McGohan Brabender required an efficient way to provide claims advocacy service for their clients and share client information between sales and service teams to support on-going growth.

Solution Benefits

Sage SalesLogix Advanced Sales & Support Clients

- Operational single data repository
- Flexible, modular customizations
- High end-user adoption rate
- High internal cost savings
- Competitive selling edge
- Return on Investment of 6 months or less

Products Used

- Sage SalesLogix v6.1 Sales Client
- Sage SalesLogix v6.1 Support Client
- Marketing Campaign management Module



the client being 100% satisfied with the resolution. Tina Werts, Account Manager, is thrilled with the time savings that has resulted from her use of Sage SalesLogix. The confidence she receives from knowing her client's employees are well cared for by the processes, technology, and people in place at McGohan Brabender enables her to sell with confidence to prospective clients.

Sage SalesLogix has not only contributed to growth and customer satisfaction but it has also reduced internal costs. Previously, monthly meetings with insurance carriers and clients to review claims took days of preparation. Now the required reports used by McGohan Brabender are readily available in Sage SalesLogix and take only minutes to generate. As a result, they have realized a one day productivity gain for several employees each month.

"We fully expect to receive a 6 month return on investment (ROI) with Sage SalesLogix."

- Dave Homan, Marketing Director

Ease of Implementation

One of the keys to the early adoption and success of Sage SalesLogix was the executive sponsorship by all the managing partners at McGohan Brabender. They embraced the vision of how Sage SalesLogix would provide their employees the ability to share information and enhance their relationship with each and every client. They also trusted the implementation team to develop a project plan and gave them the authorization to do whatever it took to meet project dates. Initial data conversion needed to be retrieved from three separate home-grown systems and imported into Sage SalesLogix for a clean migration. Using the import wizard available in Sage SalesLogix, the data transition was complete and on time. Dave Homan, Marketing Director, who managed this implementation team says, "We fully expect to receive a 6 month Return On Investment (ROI) with Sage SalesLogix."

Key Benefits of Implementing Sage SalesLogix

McGohan Brabender experienced operational, collaborative, and analytical benefits from their Sage SalesLogix implementation:

- Operational improvements – single repository of data to access, share, and manage
- Internal cost savings – new reports drastically reduced administrative tasks and time
- Flexible customizations – McGohan Brabender was able to modify the system to the way they conduct business – not changing the way they do business to fit the software
- High end-user adoption rate – employees have embraced the positive affects Sage SalesLogix has had on their productivity and the ability to service customers more quickly and accurately
- Return on Investment (ROI) – measurable operational cost savings and ROI of 6 months or less

Sage SalesLogix Partner - Simplesoft Solutions, Inc.

McGohan Brabender engaged Simplesoft Solutions, Inc., a local Sage SalesLogix Business Partner, to assist them in implementing their project. Simplesoft provided administrator and developer training, created custom Sage SalesLogix forms and scripts, assisted with data migration planning, and provided on-going support throughout and after the deployment.

"Simplesoft Solutions was instrumental in our successful installation of Sage SalesLogix. They provided us with training regarding forms, tables, and data conversion. This enabled us to complete many system modifications ourselves. Additionally, Simplesoft provided customized solutions for specific business functions related to our Customer Service department.

During our first day "live" on Sage SalesLogix, we discovered a data conversion problem which we were unable to fix. We called Simplesoft and they solved our problem immediately. I would recommend Simplesoft Solutions as a business partner to any company installing Sage SalesLogix." Dave Homan, Marketing Director



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