

CASE STUDY:

300+ hours saved
during 4th quarter



An end to years of agency frustrations



Innovative Broker Services
Folsom, CA
916-932-2357

"The simplicity of this software is great. It is clear that everything has been thought out to flow with common sense."

*E. Craig
Account Manager*

Executive summary

Innovative Broker Services developed custom benefit books and compliance packages for every employer, which was taking an average of 2.5 hours at each renewal.

Challenges

- Seven different software solutions
- Duplicate data entry
- Data in too many places
- Systems not connected
- Loss of productivity
- Solutions available were prohibitively expensive



How did the Agency Engine™ solve their frustrations?

- Removed three of the software solutions
- Eliminated duplicate data entry with Ease Sync
- Improved accuracy of client deliverables
- Increased client satisfaction

What results were achieved

- 300+ hours saved during critical 4th quarter
- Freed up time to bring on new clients
- Installed scalable and affordable solution

Learn more at www.signal-sync.com

“Agency Engine by Signal Sync is an affordable answer that simplifies and consolidates the many processes required to run our agency and serve our clients. Creating benefit books and compliance WRAP documents now take minutes versus hours.

Data stored in several locations is now centrally located on an easy-to-navigate platform. The recent integration with Ease has been a value-added bonus for us, eliminating manual data entry.”

*J. Dezordo
Director of Operations*