sage

PARS realizes significant growth with Sage CRM

PUBLIC
AGENCY
RETIREMENT
SERVICES

PARS

Making retirement work for you.

Customer
Public Agency Retirement Services

Industry
Financial Services

Location
California, USA

Solution
Sage CRM

For nearly 30 years, Public Agency Retirement Services (PARS) has designed financial products and services for public agencies, primarily in the State of California where it operates out of Newport Beach. Core to its success is the way it meets each client's unique needs, tailoring retirement plans for their employees; providing superior employee benefits while increasing management effectiveness, reducing operating costs, and relieving staff administration burdens.

From the design of the retirement plan to its implementation and ongoing administration, PARS provides comprehensive services to 600 clients with 1,300 retirement plans covering 250,000 employees and retirees.

Because of the scale and complexity of its services, the Director of Marketing Information Systems, Karen Zfaty, believed there would be significant benefits to the business by upgrading to a state-of-the-art CRM system.

The Business challenge
The company's existing solution didn't use a relational database so searching for specific information and creating reports was difficult. "If I wanted to do a report on revenue from a particular year or by different cities, I would have to set up the links myself. It was very time consuming," said Zfaty. She also felt that sales opportunities could be better managed with a superior system.

The firm looked at various options and chose Sage CRM because it struck the right balance in terms of features and price. Primarily, it would address the three areas Zfaty identified as crucial for growing the business.

These are tracking new prospects, tracking existing clients and tracking plans that had already implemented (this involves keeping up with changes in legislation that might affect different policies).

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Karen Zfaty,
Director of Marketing Information Systems,
PARS

Challenge
Providing retirement services to public agencies is a complex process, from the selling and implementation of tailored policies all the way through to their long-term management.

Solution
Sage CRM can be customized to collect and retain business specific data that is held in a single repository for fast and easy retrieval. Greater efficiencies are achieved as different teams share the same information.

Results
Sage CRM has helped Public Agency Retirement Services double its sales and improve its reporting capabilities. PARS is, saving time and is more efficient as a result.

"Sage CRM enables us to know what we are doing in terms of where we are, what's out there, and what we should be going after. It has certainly contributed to our growth,"

Karen Zfaty,
Director of Marketing Information Systems,
PARS

The solution

With the help of a local Sage Business Partner, PARS was able to deploy and customize Sage CRM to achieve its business goals. As well as providing a single repository for all customer information that could be easily accessed and used to generate reports, Zfaty was also looking to integrate it across different parts of the business. She wanted to speed up workflows and improve administrative processes, adding new fields where necessary to match the application to the business need.

PARS bought 50 licenses for administrators, as well as sales and marketing people. Because Sage CRM is delivered through a web browser, field sales representatives are now able to access it from anywhere using various portable devices such as iPhones, iPads and laptops. Sage CRM has become essential to the sales team and made them much more productive.

When they are travelling to a particular town, all the clients and prospects in that area are pulled out of the database and appointments made. As a result, employee time is managed much more efficiently.

"We looked at the different functional areas of the company to see how they interrelate and how Sage CRM could help simplify that communication," explained Zfaty. A case in point was helping pension administrators make sure retirement plans were always up to date with any regulatory changes. "Sage CRM was set up in such a way that they can pull out plans by the different internal revenue codes to make it easier to zero in on the ones that might have compliance issues," she said. "The corporate goal is to integrate all systems and run it on a standard SQL environment."

Results

In the six years since Sage CRM was implemented, PARS has doubled its revenue. While the software is not the sole reason for growth, Karen Zfaty has no doubt that it has played a significant part. "Sage CRM enables us to know what we are doing in terms of where we are, what's out there, and what we should be going after. It has certainly contributed to our growth," she said.

Sage CRM's most valuable contribution to her own working life is the ability to easily generate reports that enable the business to turn insights into action. "I use reports to give us a better idea of where we should focus our efforts and identify what types of plans are most appropriate and valuable to what types of agencies and, therefore, most valuable to us," she said.

There are other benefits around new efficiencies that don't always show up on the bottom line. "Sage CRM has saved us an enormous amount of time," said Zfaty. "I'm able to do 100 times more in terms of the way we analyze data."

Right now Sage CRM is a standalone implementation, but working with our Sage Business Partner the plan is to extend its reach to parts of the business that are still using spreadsheets rather than accessing the central repository of information.

As a champion of the software, Karen Zfaty is confident that she can bring the benefits of Sage CRM to everyone across the organization. "We want to stop people from doing the same thing for different purposes and realize the advantages of having all the data in one central place," she said.

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

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