



## Support You Can Count On

November 11, 2003

Dear Advisors, Fellow Business Owners and Colleagues,

Hope all is going well with you. Since the WEPG meeting in Winnipeg earlier this year, many of you have contacted us about our customer management/client management system. I thought I would give you some background in case you are interested for your own operation.

Since day one in the business one of our priorities has been to have an effective client management system. We have tried numerous ways of accomplishing this goal over the years and it wasn't until our introduction to PowerAssist that we were able to implement a cost effective client management system.

In our initial stages we tried to do our own client management system through Excel, Access, Outlook etc. and although it allowed us to capture client data, that is all it did.

Next we did a ton of research out in the marketplace to see what was available that was tailored for the employee benefits business. We found a few alternatives however they were not geared to the employee benefits business.

Since there was nothing available we hired a company to build us from scratch a client management system using MS Access. We spent over 1 full year invested in the development of this system, which included many man-hours on our part plus the development costs. Although we used this system for capturing basic client data, again it didn't do what we needed it to do. The system was a "pig" and was not user friendly for our people. Again...a lot of dollars down the drain in the development of this system.

A year ago (2002) I was referred to [David Stevenson at PowerAssist Technologies](#) and he has very effectively and efficiently introduced a successful client management system that does everything we need it to at little effort. His firm takes effective off the shelf products that already exist (like Maximizer Enterprise) and customizes it for our business like nothing we have ever seen!



## Support You Can Count On

Page Two

Their **APS - Employee Benefits Module** is the only system I have seen that has been tailored for the financial services business who's practices specialize in employee benefits that can offer the MGA and our their reps such tremendous functionality at an affordable price.

We now use **one system** for corporate and personal customers and it accomplishes all of our objectives.

- We can **communicate** with our customers **effectively** and easily.
- We can **email** or send out any correspondence **easily**.
- It **captures all key customer data** that is crucial for the management of our business.
- All customer **contact is recorded** so that whoever corresponds or communicates with a customer (whether sales or service) it is recorded and everyone is aware.
- **Last but not least** - it provides us with **key financial reporting** to help us manage the business and results. We can get open case activity reports, sales reports, revenue reports (standard or flat!) by person/for the office etc. to name a few.

David has impressed me by delivering on his promises, and PowerAssist has impressed our entire team with their professional conduct and effective support.

I believe this system is the right system to meet the customer management needs and I wanted to pass along this information to you.

Over the next few weeks you may be contacted by PowerAssist in order to discuss your own needs, if any, directly with them.

Yours truly

Kevin Brady, *President*  
Brady Financial Group  
[info@bradyfinancialgroup.com](mailto:info@bradyfinancialgroup.com)

Bernie Knowles, Manager Operations  
[bknowles@bradyfinancialgroup.com](mailto:bknowles@bradyfinancialgroup.com)

Brady Financial Group operates as an Independent Benefits consulting firm and has access to over 20 suppliers. Brady Financial Group currently reviews and advises over 300 companies on their employee benefit related matters. Our growth for the most part can be attributed to the service and professional advice that we have rendered in helping our clients solve their benefit problems. We pride ourselves on the level of personal service and unique strategies that we offer our local clients.