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Joe Scola
Senior Director, Technical Operations and Training
Sage Payroll Services

How Sage Payroll Services Transformed Its Business to Deliver for Customers

Sage Payroll Services is the payroll arm of Sage, a global software company with over six million customers. When its parent company added 22 new companies to its portfolio, the Sage Payroll Services (formerly PayChoice) team needed a way to standardize customer, corporate, and payroll data from disparate systems — fast. QuickBase gives Sage Payroll Services the flexibility it needed to centralize key data and build apps and workflows that automated 90% of the payroll request process and driven a 33% increase in support rep efficiency.

The Challenge

- Data from 22 separate acquisitions stored in multiple on-premises and cloud systems
- Lack of visibility into key data
- Lack of standardized processes across multiple companies
- Increased pressure to deliver payroll services to growing customer base

The Solution

- QuickBase for data consolidation and rapid application development
- Automated workflows to standardize processes across multiple sites and companies
- Replaced Goldmine with QuickBase for an intuitive, scalable CRM

The Results

- 90% automation of the payroll request process
- 33% increase in accounts per rep
- 50% reduction in report generation tasks
- Improved insight into payroll performance and revenue companywide

About QuickBase

QuickBase is a low-code platform for building, customizing, and integrating custom business applications. With more than 6,000 customers and 500,000 active users, QuickBase is the technology of choice for companies that want to empower business users to solve their own challenges while maintaining the governance and security of an enterprise-quality app development system.

The Need for Fast Consolidation

Sage Payroll Services offers payroll and bureau solutions to large and midsized companies across the globe. It has built its success on a promise to provide a better way to manage payroll with more profit, more service and live support. It's an assurance that's paying off: The company has yielded some of the highest customer retention rates in its industry.

However, responding to customer needs became increasingly complex when Sage Payroll Service's parent company acquired 22 new businesses with disparate databases that had to be centralized for process efficiency and information sharing. A wealth of client, sales and payroll data was trapped within the siloed databases — information that needed to be standardized across the different parts of the company in order to service customers and grow the business. Finding a solution that could aggregate data from just about any source and enable the business to drive digital transformation was a top priority.

How QuickBase Enabled Digital Transformation

Before its acquisition by Sage, the payroll services group was called PayChoice. Joe Scola, Senior Director of Technical Operations and Training, found QuickBase while at PayChoice, registering for a free trial and getting hooked on the flexibility the tool gave him to manage many different types of data in very customized ways.

"I spent a weekend developing with QuickBase and couldn't believe the things it could do — it could handle all the different types of data we needed to manage," says Scola.

When the demand for a data consolidation solution at Sage presented itself, Scola was sure QuickBase was the right solution. He started by building a CRM app on QuickBase to replace GoldMine for centralizing customer data. The CRM app is used to manage and track all the payroll activities for Sage customers, including when payroll was submitted and any ancillary services they signed up for, such as workers' comp. All payroll interactions are managed through the app, and automated workflows, tasks, and reminders ensure all payroll deadlines and change requests are met.

By replacing GoldMine with QuickBase, Sage Payroll Services was able to automate almost all of the payroll service request process, giving business leaders instant

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> "

Best of all, because QuickBase is a low-code solution for rapid application development, Scola and his team were able to build the infrastructure to support digital transformation without overtaxing the software development team.

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visibility into request status. Customers benefit from the app's built-in ability to transfer a request to the right person quickly, so they can be processed quickly.

The QuickBase automation didn't stop at CRM. Scola used a QuickBase template to build a sales automation app. Here, all sales, referral and partner information is centralized and managed, along with billing and commissions, including sales volume and revenue.

"All the acquisitions have their own databases, we have our payroll platform, and QuickBase is the place where all that comes together so we can run the business," explains Scola. "All our information ends up going through QuickBase, and that's how we know where everything stands."

From Pain to Gain

Despite the difficulty of re-engineering processes after the acquisitions, Sage Payroll Services has been able to maintain its commitment to delivering exceptional customer service. QuickBase has been a key player in that effort by enabling the business to close process gaps quickly while offering the right governance and controls.

"Sage Payroll has a strong service philosophy, and QuickBase certainly plays a big role in that," says Scola. "No calls get missed and no requests are seen twice. Without QuickBase, I don't think it would be the case."

The results speak for themselves. 90% of all payroll requests are handled electronically via QuickBase, eliminating manual efforts. Service reps have seen a 33% increase in the number of requests they can process, driving customer satisfaction and retention. Finally, Sage Payroll Services has been able to reduce the time required to generate key monthly sales and service reports by 50%.