



Case Study

Success Story: Pro Benefits Group, Inc.

Sohodox Helps Deliver Better Retirement Services in Arkansas

"We were looking for a solution that would help us share data with our clients without compromising information security."

- **Korisa Knight**, Office Manager and New Business Manager

The Challenge

The information boom has introduced several opportunities for small offices and independent professionals to improve the way they manage their business information and improve efficiency. Yet with every opportunity small businesses get, the challenge has been how to use technology to improve productivity without getting overwhelmed by it.

One such organization was **Pro Benefits Group, Inc.** "We are in the business of providing pre-tax life insurance and annuities to education professionals," says Korisa Knight, Office Manager and New Business Manager of the company. Pro Benefits has been in the business of serving the professional educator's financial needs for 22 years now, helping them plan in advance for a more secure future after retirement. Like every small business, Pro Benefits has grown with time as they gained experience serving their clients. The firm reached a point when the amount of data being generated and processed in paper and electronic formats was so huge; they found themselves **confronted by two major challenges:**

1. Organizing information and systems viz. documents, hardware, software etc. effectively so as to prevent communication gaps, and;
2. Discovering, mastering and implementing a solution using which they could share data with clients without compromising information security.



The Solution

Korisa had identified the company's requirement - **dependable and efficient document management software for small businesses**. She knew how to find it: using Google's search engine, she looked for the term document management software and was taken to the Sohodox page. After reading about the features and benefits offered by this small business software, Korisa took a "quick tour" of Sohodox, viewing screenshots and videos, and downloading the fully-featured 30-day evaluation version. After discovering how easy it was to use, she was sure Sohodox was what Pro Benefits needed, and purchased multi-user licenses online from the Sohodox web site itself.

"We find Sohodox a great asset to manage our documents while keeping them at one central location; and best of all, it came at a reasonable price for our budget."

- Gary Kandlbinder, CEO,
Pro Benefits Group, Inc.

The Pro Benefits team immediately experienced the benefits of using Sohodox document management software for small businesses. In Korisa's words, "There are just so many ways to do everything...you can drag and drop documents back and forth to different folders...there are tags, document types... We **save a lot of time**, keeping documents in check." The Pro Benefits team found they no longer needed to keep files on the desk but had all their documents **stored at one central location** (database). As the firm's Office Manager and New Business Manager, Korisa felt the purchase process was simple. They got the product key and all of the information they needed to get started on time too. "It was easy to use right from the start," said Korisa. The three features she found best were document types, the ability to tag documents, and the MS Outlook style **user-friendly interface**. Through its benefit-driven feature set, Sohodox helped Pro Benefits overcome both the challenges they faced: that of managing information and systems to **improve their internal communication**; and the ability to share **data with clients securely** using built-in features like email, fax and the ability to burn data to a CD/DVD.

The Outcome

Sohodox small business document management software helped Pro Benefits...

- Save time through quick and powerful search features, leading to increased productivity
- Provide complete and accurate data to clients, leading to improved customer service
- Get productive from Day 1 through a user-friendly, MS Outlook type interface.

The case of Pro Benefits is typical of small businesses as they face immense competition from larger players who can afford complex and expensive information management systems. If the systems fail, they can absorb the financial and other losses suffered. A small office cannot take chances. Simple, reliable and benefit-driven document management systems like Sohodox are the ideal solution for small businesses.



More about Sohodox

Sohodox is a Windows based document management software for your small office. Using Sohodox you can quickly create a centralized, searchable database of all your documents. Add documents by dragging and dropping existing files and scanning paper documents. Sohodox works with any TWAIN compatible scanner. Save scanned documents as PDF, TIFF, JPEG, or PNG files. Re-arrange and add pages to PDF or TIFF files at any time. Sohodox features a modern MS Outlook style user interface that you are already familiar with.

Sohodox is a product of ITAZ Technologies Pvt. Ltd.

Let Pro Benefits' success story be your firm's too!

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About Pro Benefits Group, Inc.

Pro Benefits Group, Inc. is an Arkansas Corporation that has been serving professional educators' financial needs for 22 years now. They currently operate in four states: Arkansas, Texas, Florida and Georgia. You can learn more about Pro Benefits at www.pbfsi.com.
