



Insure your Success with Stonefield Query for GoldMine

Company Name

DI Broker

Established

1982

City

Lake Oswego, OR USA

Website

www.dibroker.com

Contact

Patty Calhoon

Title

Business Manager

Industry

Insurance

Query Version

Stonefield Query for GoldMine

Dealer

Stonefield Software Inc

City

Regina, SK Canada

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Notable Quotes

"Stonefield Query for GoldMine provides Goldmine users with an efficient and easy-to-use tool. It empowers even the novice computer user with independence when gathering data or creating reports."

Patty Calhoon

DI Broker in the Spotlight

DI Broker is an insurance wholesaler with corporate headquarters located in Lake Oswego, Oregon. They have regional offices in Miami and Portland and several satellite offices around the country. DI Broker has provided disability and long-term care insurance to insurance brokers across the United States for over twenty-five years.

Patty Calhoon is the Owner and Business Manager of DI Broker. In 2003, she learned they would be able to improve internal communications with all offices by utilizing the capabilities of an intranet and upgrading to a CRM program on a SQL platform. Patty looked at several alternatives and decided that GoldMine had the capabilities to meet their needs.

The DI Broker Problem

The first steps Patty took when she began her search for a new CRM program was to examine the reporting needs of each department. She discovered that the key departments all had very different reporting requirements. Patty needed a program that could generate a simple contact list, monitor workflow, and create complex financial or procedural reports.

Patty examined many of the features of GoldMine before she purchased the program. She looked at the standard reports in GoldMine and discovered that none of them met her needs. She attempted to build a customized GoldMine report and found the report writer was so complicated it was next to impossible for the average person to use. DI Broker needed an easy-to-use data mining and report-writing solution that could be deployed to end-users around the country.

The Stonefield Solution

After discussions with Patty regarding her report-writing requirements, a certified GoldMine consultant recommended Stonefield Query for GoldMine

as the data mining and report-writing solution. "Stonefield Query for GoldMine provides Goldmine users with an efficient and easy-to-use tool," said Patty. "It empowers even the novice computer user with independence when gathering data or creating reports."

Once the conversion to GoldMine was complete, Patty learned how to use Stonefield Query through a series of online training webinars. "I attended all levels of online training. With Stonefield Query for GoldMine it is very easy to learn how to search for data and set up reports," said Patty. "I found the online training webinars to be a very valuable source of information. Even when I was retaking a training session with one of my staff I would pick up on new techniques."

The Result

DI Broker improved their internal communication by utilizing capabilities of an intranet, GoldMine, and Stonefield Query for GoldMine. DI Broker uses Stonefield Query for 100% of their data mining and report-writing requirements. Each department is able to create reports that meet their specific requirements. Now when a user generates a report at one workstation, all other workstations have instant access to it.

DI Broker has used Stonefield Query for GoldMine since March 2003 and have recently upgraded to the latest version of the software.

Everyone at DI Broker loves Stonefield Query. It is a valuable tool that is used everyday. "Stonefield Query for GoldMine is a must," said Calhoon. "When you look at its ability to access data or the ease of creating reports, GoldMine without Stonefield Query should not even be an option."