



New Customer Snapshot

Highland Capital Brokerage will streamline processes and improve forecasting with Infor SunSystems



Facts at a glance

Products: Infor SunSystems®, Infor Expense Management, Infor Corporate Performance Management, Infor ION®, and Infor EPAK

Industries: Insurance and investment

Country: US

“We need sophisticated applications and tools to accurately and efficiently capture, process, and interpret data to positively affect our business and its strategic direction. Infor, as a leader in this space, provides the technical solution as well as the human capital to help us achieve our goals.”

—Drew Lawrence, Executive Vice President and Chief Financial Officer, Highland Capital Brokerage

About the company

Highland Capital Brokerage (HCB) provides insurance and investment providers with point-of-sale support, advanced marketing, and creative estate and business planning techniques. Committed to helping successful financial advisors and insurance professionals to grow their business, HCB creates trusted relationships by delivering customized insurance solutions, and personalized local service and support. To learn more, visit www.highlandbrokerage.com.

Business case

- Implement a comprehensive financial and business management solution that supports key areas, such as general ledger, accounts payable, accounts receivable, financial reporting, budgeting, forecasting, and employee expense management.
- Standardize and manage the budget process and support what-if analysis.
- Improve reporting and forecasting capabilities by increasing visibility to real-time data.
- Increase overall staff efficiency by reducing manual processes and paperwork.
- Support growth and change, and give executives the confidence to make more informed business decisions.

Why Infor?

Infor delivers:

- Business software that’s designed to streamline the reporting process and provide powerful budgeting and forecasting capabilities.
- A unified ledger that shows the full impact of financial postings by combining the functions of a general ledger, sales and purchase ledger, project ledger, cashbook, and user-defined ledger.
- The ability to turn information into insight in real-time for a clearer view of the business via a flexible, dimensional chart of account structures.
- Reporting capabilities to help standardize and manage the budget process and support what-if analysis.
- A fully automated system for managing travel and entertainment expenses, employee-initiated purchases, and employee time capture.
- Fast and simple integration between Infor and third-party applications.

“We are very excited to partner with Infor.”

—Drew Lawrence,
Highland Capital Brokerage

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