



Benelinx

Brilliantly Bundled

Build A NextGen Agency



Ignite a Digital Transformation

The pandemic has made a lasting impact on employee benefits that's here to stay. Technology that streamlines communication and agency management is no longer optional—it's swiftly becoming a requirement for brokers looking to keep up with the competition.

Do you want to work smarter and boost productivity? To land new business? To better serve your clients? Then it's time to embrace the digital transformation.

In this guide, we'll explain how the right technology can help you save time and grow revenue. We'll also provide practical strategies on how you can build a NextGen agency.

What is A NextGen Agency?

A NextGen agency takes an integrated approach to every facet of operations, from day-to-day management to client experience and sales & renewals. That mindset means embracing business solutions and workflows that interact seamlessly and are accessible remotely.

Three Systems Every NextGen Agency Needs

These three systems are used by every benefits broker, but many are still relying on manual data entry and old school communication methods to get the job done. The right technology can streamline and automate many tasks that were traditionally done by hand, saving you valuable time and energy.



AGENCY MANAGEMENT

Organize and manage data and client information within a secure, cloud-based platform.



SALES & RENEWALS

Access real-time plan and policy information and export client data to create custom market proposals and benefits booklets.



CLIENT EXPERIENCE

Empower clients and provide a seamless experience with online self-service access and tools.

Agency Management System

Think of your agency management system (AMS) as your filing cabinet. With modern innovation, there is no reason you can't access accurate, real-time data – anytime, anywhere. You can opt out of manually importing data, digging through old spreadsheets in your agency's server, and navigating disconnected legacy systems.

An integrated agency management solution takes care of those tasks so you can focus on the work that matters. More time for strategic and revenue-generating work equals happier, more productive employees.

Not only does an AMS effectively manage client data, it also enables better client service management, commissions tracking and employee performance tracking. A secure, cloud-based system can keep your data organized and accurate, which is especially critical if your team is remote or your business has multiple locations.

85%

of employees lose at least one to two hours of productivity a week searching for information.

[\(Dynamic Signal\)](#)

82%

say that employees' happiness on the job is significantly impacted by how well their workplace technology performs.

[\(Harvard Business Review\)](#)

All Agency Management Systems Are Not Created Equal.



Remember, your AMS will house your most important business assets.

We've built Benelinx on [Salesforce](#), the world's leading CRM, to provide best-in-class security, reliability and architecture.

Sales & Renewals

An AMS is great for data management, but many systems on the market don't manage the full sales & renewal process. Today's brokers must be prepared to go head to head with C-Suite decisionmakers to provide sophisticated analytics on market proposal recommendations.

To maintain a competitive edge, brokers will need to create proposals that use accurate data at the member level and create projections based on multiple contribution scenarios. Brokers who can create and edit multivariate data models in real time (like during a client meeting) are sure to stand out.

While conducting this type of in-depth analysis the old-school way i.e. Excel spreadsheets and manual data entry is possible, it is immensely time-consuming, delays decision making, and creates big potential for error.

Eliminate this hassle with a solution that automates the sales & renewal workflow, and systematically updates your client plan and policy information.

96%

of employers surveyed
value brokers who can
offer innovative solutions.

[\(Willis Towers Watson\)](#)

94%

of employers surveyed value brokers
who can engage in strategic
conversations.

[\(Willis Towers Watson\)](#)

Go From Quote to Proposal in Minutes.

Benelinx lets you create custom market proposals
and benefits booklets with just a few clicks.

Our software also completes multivariate calculations within
the system, all the way down to the member per pay period.



Client Experience

Today's client relies on a multi-channel communications approach, trusting online research that includes reviews and testimonials as well as person-to-person broker advice.

Now more than ever, providing quality service is key to client retention and satisfaction. Yet, the employee benefits industry hasn't adopted technology that can facilitate better service on a mass scale. By embracing tools that can provide an exceptional client experience, agencies can stay ahead of the curve.

Insurance agencies and brokers need to optimize the customer journey to provide a seamless experience across digital and traditional channels. Brokers must have the ability to interact digitally with clients and be prepared to take communications offline when it's beneficial.

One way to empower clients is by offering enhanced access to your agency through online self-service tools. This helps eliminate unnecessary back-and-forth fielding requests for market proposals and other key documents, while making your brokers' and clients' lives a little bit easier.

75%

of customers expect companies to use new technologies to create better experiences.

[\(Salesforce Research\)](#)

84%

of customers say the experience a company provides is as important as its products and services.

[\(Salesforce Research\)](#)

Empower Your Clients.



Our Self-Service Client Community provides instant access to market proposals, in-force policies, contracts and services, and time-saving tools.

What's the ROI of Your Investment?

Business solutions like an AMS are not an expense—they are an investment in your future success. Like any investment, calculating ROI is critical to deciding whether a tool is right for you.

Now, it's Time for the Fun Part: Calculating the Value of Your Investment!

We've crunched the numbers for our agency management solution Benelinx, but you can replicate the formula for other software.



COSTS

Two Performance
Package licenses (\$4,320) +
Implementation and
Training & Support (\$1,500)
for Year 1 Costs
\$5,820



BENEFITS

Benelinx increases
productivity
by up to 50%
giving you
2x capacity
to take on new clients



ROI

At **\$30 commission**,
one employer group of
17 members will pay
for your investment.
**Any sales beyond this
are pure profit**

Ready to Move Forward? We Can Help.

Benelinx provides benefits brokers with an integrated approach to agency management, automating day-to-day operations, sales & renewals, and client service within a secure, cloud-based platform. Our mission is to transform the employee benefits industry, creating opportunity, value and enabling a quality experience at every level, from your direct employers to their policyholders.

Whether you know where you want to be or you're still figuring it out, we're here to help. We'd love to share how Benelinx can help you achieve your goals in 2021 and build a strong foundation for your agency's future.



SCHEDULE YOUR PERSONALIZED DEMO TODAY:

www.benelinx.com/schedule-demo

Contact Us Today.

www.benelinx.com

info@benelinx.com

888.227.1602