

Principal Success Story

 **Bolton & Company**

 **Staff: 260**

 **Southern California**

 **Groups: 400+**



Jenelle Valiquette
*Benefits Technology Specialist,
Bolton & Company*

Saving Time and Gaining Peace of Mind with the Principal Connection

According to Jenelle Valiquette, Benefits Technology Specialist, Bolton & Company

When Jenelle joined Bolton & Company as their Benefits Technology Specialist, one of her responsibilities was to discover a platform that would move the firm away from paper and onto an online solution that would capture all of their benefits elections. They needed an automated process that would streamline the way they worked so that the firm could work smarter, not harder. Initially, Jenelle began working with a platform that brought everything online, but the system was not intuitive. With long wait times after submitting reports, to files coming back with errors, the full process would take up three weeks of Jenelle's time. Not only was

Jenelle having issues with the platform, but her clients were not able to adapt to the technology, as it was too complicated for them to use.





Then Jenelle found Ease and the Principal connection. For Jenelle, it was mind-blowing to find a solution that would automatically fill her groups' information into carrier applications. Now, Jenelle's process has become simple, automated, and streamlined, allowing Jenelle and her firm an opportunity to worry less about processing carrier forms. Additionally, with the time she is saving with the Principal connection, Jenelle now has more time to grow her relationships with her clients and bring on new clients.

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Having the Ease team set up this connection saved us a ridiculous amount of time, and they continue to help us on a regular basis. Our Ease Implementations Analyst is always on top of things, and our Ease client manager is always monitoring our account to make sure everything is getting processed and managed quickly. It's great to know that I have experts that I can reach out to and lean on.

Jenelle Valiquette
*Benefits Technology Specialist,
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How the Principal Connection Works for Jenelle

-  Saves weeks of time per group build
-  Creates a selling tool for new clients that have Principal accounts
-  Simplifies the enrollment process and experience for Jenelle and her clients
-  Rounds out service offerings for clients, providing the opportunity to bring in more business

“The biggest benefit of this connection is that it’s given us peace of mind. With this connection, we’re now able to spend time focused elsewhere, and not have to train our benefits staff. The automation really makes it so much more simple. Additionally, it has served as a selling tool. It allows us to go out and say, ‘Oh, you have Principal? *We have a solution for you.*’

Jenelle Valiquette
Benefits Technology
Specialist, Bolton
& Company

The Success

As a result of the Principal connection, Jenelle and the Bolton & Company team are now able to focus on what’s most important—their relationships with their clients. With everything being taken care of seamlessly by the Ease team, their client satisfaction has increased. Her clients now feel relieved that with the Principal connection, open enrollment and employee changes are two fewer responsibilities for them to worry about, which in turn allows them to better focus on their employees.

Additionally, Jenelle has found great success in working with the Ease team. She appreciates hearing from her dedicated team who let her know when there are new connections or when one of her groups is eligible to be set up. Jenelle was also grateful for the hands-on training experience with the Ease team. With her Ease experience, Jenelle now feels she has set herself apart from the competition.