



Benelinx

Brilliantly Bundled



MEDIA KIT

New Technology Automates Employee Benefits Agency Management

Benelinx streamlines workflow to save brokers time and increase revenue

DENVER (June 10, 2020) – Benelinx has formally announced the launch of its new software solution for employee benefits agency management. Benelinx automates the insurance life cycle in a single, intuitive platform to help agencies leverage real-time data, build greater trust with clients and carriers, and stand out from competitors in today's crowded marketplace.

The global pandemic has disrupted brokers' typical communications and client service models. In April, a Gallup Panel reported that 62 percent of employed Americans have worked from home during the crisis, a figure that doubled since mid-March. Despite the nation's steps toward reopening, this number is likely to remain high in coming months, spotlighting the insurance industry's need for technological solutions to optimize a virtual workplace.

Beyond the shift to remote work, COVID-19 has caused sweeping changes in the healthcare industry, from the rise of telehealth to the movement away from traditional employer-based health insurance. These trends will certainly impact benefits brokers, especially as they move into open enrollment season. Now more than ever, it's critical for brokers to be proactive, helping clients navigate this challenging landscape.

"In this swiftly changing world, Benelinx offers brokers a better way of doing business," said Benelinx CEO & founder Rachel Zeman. "When it comes to technology, it's no secret our industry is behind the curve. Our goal is to drive innovation to help empower the industry at every level – from brokers and agencies to their employees and clients."

Benelinx functions as a "virtual CIO", harnessing data to inform strategy and help agencies scale faster. A streamlined workflow equals increased efficiency and greater value delivered to clients.

Key features include:

- ▶ Workflow Automation
- ▶ Systems Integration
- ▶ Executive Dashboards
- ▶ Embedded Quoting Engine
- ▶ Self-service Client Portal
- ▶ Custom Branded Proposals
- ▶ Commissions Management

Benelinx has leveraged Salesforce's proven CRM to build an affordable and accessible agency management system. A turnkey solution for both new and current users, Benelinx integrates seamlessly with a variety of Salesforce licenses, providing instant access to all existing data processes and workflows. To learn more about Benelinx or request a free demo, visit benelinx.com.

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About Benelinx

Founded in 2019 by a seasoned broker, Benelinx is a complete agency management system for the employee benefits industry. Benelinx consolidates data and workflow in a centralized hub to help brokers stay connected, and improve relationships with staff, clients and carriers. Powered by Salesforce, the leader in CRM and secure cloud-based business applications, Benelinx provides instant access to real-time data from any location, anytime. Visit www.benelinx.com for more information.

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About Benelinx

Benelinx is a complete agency management system for the employee benefits insurance industry. Unlike other software solutions, Benelinx streamlines workflow at every stage of the sales cycle to save time and increase revenue.

Benelinx is powered by Salesforce, the industry standard for Customer Relationship Management (CRM) and secure cloud-based business applications. Customized specifically for agency management, Benelinx eliminates outdated systems and manual data entry. Instead, it consolidates data and workflow in a centralized hub to help agencies stay connected, improving relationships with staff, clients and carriers. Ideal for remote work, Benelinx provides instant access to real-time data from any location.

For more information, please visit www.benelinx.com.

Fast Facts

■ HISTORY

Benelinx was founded in 2020 by Rachel Zeman, an experienced employee benefits broker and agency owner looking to transform the industry through innovative technology.

■ MISSION

To transform the employee benefits industry, creating opportunity, value and enabling a quality experience at every level, from our direct employers to their policy holders.

■ KEY SPOKESPERSON

Rachel Zeman, CEO & Founder

■ LOCATION

Headquartered in Longmont, Colorado.

■ MEDIA CONTACT

Please direct all media inquiries to ashley@greco.digital.

■ SALES CONTACT

Request a demo or free trial at rachel@benelinx.com.

■ CONTACT

Please direct all other inquiries to info@benelinx.com.

Features

Workflow Automation – Eliminates outdated systems and manual data entry to increase your agency's efficiency up to 10x.

Commission Management – Easily track carrier commission reports to ensure correct, on-time payments.

Systems Integration – Manage the full market proposal process from census, to quote, to client plan selection, in a single intuitive platform.

Executive Dashboard – Create multiple dashboards to visually illustrate data at the click of a button.

Census Upload – Imports census data, including employee, dependent and election information, to a centralized database, in one upload.

Quoting Engine – Quickly access carrier quotes and plan information, as well as employer and census data. Easily create comprehensive proposals with informed market recommendations based on existing policies or new employer needs and requirements. Go from quote to proposal in less than 5 minutes.

Self-service Client Portal – 24/7 access to tools and plan information to increase client satisfaction and streamline account management.

Custom Branded Proposals – Customize branding and layout of all client-facing documents for turnkey generation of proposals, quotes and benefit summaries.

Powered By Salesforce

Benelinx leverages Salesforce's proven security and reliability, and best-in-class architecture to provide customers with a complete agency management system. It offers a highly customized configuration that gives agencies all the tools necessary to streamline the sales cycle and operational management, including a custom quoting engine and branded document generation.

Benelinx is a turnkey solution for agencies new to Salesforce as well as for current users. Benelinx integrates seamlessly with an agency's account, providing instant access to all data processes and workflows currently managed by Salesforce.

Pricing (ISV License)

Core

\$65 /user/month

Includes:

- Custom package built specifically for you
- Reports and dashboards for workflow visibility
- Manage and track client interactions
- Outlook and Gmail e-mail integration
- Mobile functionality
- Privacy & security controls powered by Salesforce
- **ADD ON:** Self-service Client Community

Performance

\$130 /user/month

Includes Core Plus:

- Fully integrate your sales cycle in our centralized system
- Built-in Quoting Engine
Generate custom market proposals
- Easily upload or download client census data
- Track and manage employee elections
- Automatically duplicate sold quotes into your Client Account Policy details
- Create Benefits at a Glance in minutes
- **ADD ON:** Self-service Client Community

Pricing (OEM License)

Core

\$90/user/month

Includes:

- Custom package built specifically for you
- Reports and dashboards for workflow visibility
- Manage and track client interactions
- Outlook and Gmail e-mail integration
- Mobile functionality
- Privacy & security controls powered by Salesforce
- **ADD ON:** Self-service Client Community

Performance

\$180/user/month

Includes Core Plus:

- Fully integrate your sales cycle in our centralized system
- Built-in Quoting Engine
Generate custom market proposals
- Easily upload or download client census data
- Track and manage employee elections
- Automatically duplicate sold quotes into your Client Account Policy details
- Create Benefits at a Glance in minutes
- **ADD ON:** Self-service Client Community

Leadership

■ **RACHEL ZEMAN, FOUNDER/CEO**



Rachel Zeman is an entrepreneur and founder of Benelinx. Prior to Benelinx, Rachel started her own brokerage firm, RiteHealth Solutions, in 2009. Over the next decade, RiteHealth grew into a well-known Boulder agency that supported local businesses. RiteHealth was acquired by HUB International in March 2019.

Rachel is passionate about providing brokers and agencies with innovative tools and resources to help them thrive. She understands the people, businesses and culture of the employee benefits insurance community inside and out.

Corporate Info

■ WEBSITE AND SOCIAL MEDIA



www.benelinx.com



www.linkedin.com/company/benelinx



www.facebook.com/benelinx



www.twitter.com/benelinx

■ COMPANY CONTACT

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