



## Out With The Old, In With The New Strategies for 2021 Open Enrollment

As we gear up for open enrollment, are you confident that your Agency is ready? It's time for a new strategy to tackle renewal season, one that embraces the digital transformation that's sweeping the insurance industry. There's no doubt about it, the right technology can help you increase sales, boost productivity, reduce stress and build client trust.

Be ready with our playbook for open enrollment, so you can retain your clients, win new business and stay sane when 4th Quarter hits.

# Go From Chaos To Order

Is your agency relying on a system built for Commercial Insurance and retrofitted for Employee Benefits? Are Excel spreadsheets still your primary tool for data management? Old databases and workflows may not cut it anymore, leaving client files easily compromised.

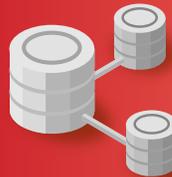
85% of employees lose at least one to two hours of productivity a week searching for information. [\(Dynamic Signal\)](#) Access to files like eligibility, rates, contributions and plan documents in real time isn't just a bonus—it's essential for both your team and clients.



Give your team a leg up with an advanced database like Salesforce that greatly simplifies client data management.



A secure and reliable database is a must. Make sure your system is safe, ISO 27018 certified, and compliant with HIPAA.



Look for agency management systems to seamlessly connect sales, service and operations. The fewer times you touch the data, the smoother open enrollment will flow.

# Go From Fearful To Confident

96% of employers value brokers who can offer innovative solutions. [\(Willis Towers\)](#)  
To maintain a competitive edge, brokers must be prepared to build complex proposals spanning from member level data with multiple contribution strategies to alternative solutions like level funded plans.

Be ready to communicate your internal strategy to clients so they know you're organized, innovative and poised for success.



Alternative options like level-funded plans combine the cost savings of self-funding with the risk mitigation and fixed-payment structure of fully insured plans.



The best CPQ tools enable you to create and edit data models in real time (like during a client meeting). Brokers who can think on their feet are sure to stand out.



Search the market for tools like Benelinx that help you automate the proposal process by creating market proposals and benefits booklets with just a few clicks.

# Go From Transactions To Trusted Partner

84% of customers say the experience a company provides is as important as its products and services. [\(Salesforce\)](#)  
Be a valuable resource to your clients and make their experience seamless across all channels.

Today's customer wants to change contributions, review alternate plans and upload census changes via a secure portal, not through an email or phone call.



Prioritize agency management systems that offer a self-service portal for clients to boost customer satisfaction and your team's productivity. Self-service portals eliminate up to 60% of incoming requests..



Now is the time to add new benefits to meet your clients' changing needs, like hospital indemnity plans, Flexible Spending Accounts, increased PTO and mental health coverage.



The right technology is a win-win. 85% of employees say they have a better understanding of their benefits after using a personalized benefits engagement tool. [\(BenefitsPro\)](#)

## Give Yourself Some Space

Is it the first impression or the last that drives decisions? Give yourself space to be more creative, flexible and strategic.

Provide your clients with a positive experience from start to finish to keep them coming back year after year.



Integrate your agency management system with your client's BenAdmin to pull in census data, push out new policy and rates, and reduce build time.



Prove your value beyond open enrollment with Annual Stewardship Reports that track every touchpoint on an account, from service requests, to client communication, to billing and claims.



Thank your clients for their business! Everyone likes feeling valued. Remind them that referrals are greatly appreciated.



## Go From Siloed Information To Streamlined Applications

Across the industry, innovative technology is driving higher engagement, greater health and financial results and stronger client relationships. The right agency management solution can help you retain your clients, upsell new solutions to increase your revenue and win new business.

Unmatched in the Benefits industry, Benelinx has harnessed the power of Salesforce's database and customized it for Employee Benefits to **guarantee long term sustainability, continued prosperity** and **additional opportunity**.

All this is available at a reasonable price, with **plans starting at \$95/mo**. Use our [ROI calculator](#) to find out what your first year of Benelinx will cost and how to recoup on your investment.

Contact us today to ensure you're ready for open enrollment 2021! Sign up for a personalized demonstration at [benelinx.com/schedule-demo](https://benelinx.com/schedule-demo) or contact Sales at 888-227-1602.