

Progressive Benefits, Ltd.

LEVERAGING
THE POWER OF
OPPORTUNITY
MANAGEMENT TO
TACKLE GROUP
BENEFITS

As Principal of a practice that sells solely group benefits, Brooks Neill faces a significant customer service challenge: annual renewals for each policy he sells. Unlike non-group sales, group policies come up for renewal every 12 months, making each account a potential win/lose situation every year. This requires that both the renewal process and each client relationship be managed with great care.

Neill remembers a time in the past when he and his team used a less-than-optimal method for tracking accounts. "We literally had a magnet board with magnets assigned to each account," says Neill. "We tracked progress by moving the magnets across the board." Of course, magnets could only go so far, and as the firm acquired more clients, the more difficult the magnet system became.

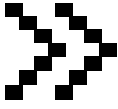
Knowing that effectively tracking and managing policy renewals drives the bulk of the company's revenue dollars, Neill soon opted for an improved approach, licensing E-Z Data's practice management solution back in the DOS days. As soon as SmartOffice Online was offered in 2004, he made the switch to the Web solution. Today, Neill and his team use the opportunity tracking module (SmartOpportunity) in SmartOffice to manage their complex renewal process. "The Opportunity Dashboard gives us visibility into the current stage of every account and lets us know the next steps needed to close the sale," says Neill. "The magnets are gone, and in their place we have a reliable process that ensures we never make a mistep."

Neill's team also uses SmartOffice to segregate and clarify stages in their business and sales processes. Using SmartOpportunity, they create specific campaigns to support new sales, policy renewals, and service issues.

"In SmartOpportunity, campaigns can be created to support almost any process and help close business. It's a tool that anyone in the benefits business can use to turn complex client and account tracking challenges into manageable, predictable business processes."

Brooks Neill, Principal
Progressive Benefits, Ltd





For instance, using a 'New Sales' campaign, the progress of every prospect can be tracked by its current stage in the sales cycle. Every SmartOffice user has real-time visibility into the outcome of the last activity on the account, and the team can build a more accurate sales pipeline based on estimated close dates. Defining the stages clearly and tracking them online helps the entire team be more productive and more organized, and ensure that all steps in the sales process are carried out accurately.

With client satisfaction a critical factor in closing renewal sales year after year, successfully managing service issues is also vitally important. In Group Benefits, service issues can include everything from improper claims payments to missed enrollment periods, and whether the fault lies with the client or the carrier, making the client feel satisfied with the end result is in the hands of Neill's staff. Using SmartOffice, anyone in the office can see at what stage any given service issue sits. No one is left guessing a status, client inquiries can be answered instantly by anyone, and follow-through is tracked and managed with ease. The result: higher client satisfaction and, hopefully, future renewals.

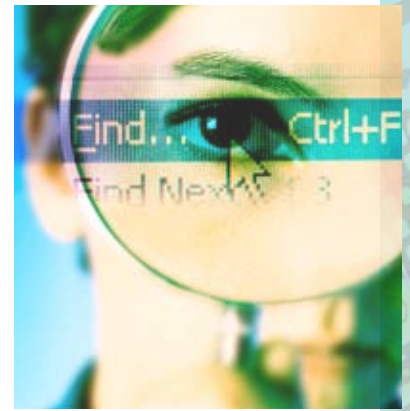
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Neill stresses that, no matter what your business focus, SmartOffice and SmartOpportunity can help streamline, organize, and accelerate your business processes. "In SmartOpportunity, campaigns can be created to support almost any process and help close business. It's a tool that anyone in the benefits business can use to turn complex client and account tracking challenges into manageable, predictable business processes."

About E-Z Data, Inc.

E-Z Data, Inc., established in 1986, is a leading provider of front-office systems for insurance companies, banks, broker-dealers, general agents, agents, and investment advisors, E-Z Data solutions are used by more than 100,000 advisors worldwide and over 50 leading financial services companies, including HSBC, MetLife, National Financial Partners, Prudential, and Securian. The company's domain expertise, coupled with mature, industry-specific business solutions, results in consistently successful customer implementations.

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For more information about SmartOffice and SmartOpportunity, visit www.ezdata.com or call 800-777-9188.