

By providing online access to the most current group benefits information, SmartGroupBenefits helps users streamline the group benefits planning process for every client. SmartOffice provides a complete view of all benefits for one or multiple clients, making it easy to manage both their group and individual coverage. This comprehensive approach to group benefits management allows advisors to track written business for business clients, as well as utilize the Employee Census to run proactive marketing campaigns. Using this information, advisors can provide clients with valuable guidance from a group perspective, as well as track individual policies. Users are also able to track multiple plans under each group product, and the solution provides the flexibility to customize new categories of benefits for each group product type.

SmartGroupBenefits provides these valuable features:

- **Employee Census Import** significantly reduces manual data entry by allowing you to transfer updated employee census names into your SmartOffice database at the touch of a button.
- **Group Benefits Reporting** allows you to track and manage policy renewal dates and identify cross-selling opportunities.
- **Employee Census Statistics** provides one-click access to a consolidated summary of key census data.
- **Group Certificates** allows users to view individual certificates of group coverage from an individual contact record.
- **Customizable Benefit Tracking** makes it easy to add and customize new categories of benefits for each group product type.

Track and manage employee census data within the business contact record.

