

Smart Solutions for Today's Benefits Broker

Find new ways to grow your business and retain existing clients. Boost customer satisfaction and set your agency apart in an increasingly competitive marketplace.

Sales Cloud

Streamline your mission-critical workflows to fuel growth

Marketing & Lead Generation

Sustain growth for your agency

- Email marketing automation
- Lead sourcing and management
- Prospect discovery and presentations

Agency Management System (AMS)

Full life cycle relationship management system

- Account and contact management
- Activity and workflow management
- File management
- Opportunity management
- Plan management
- RFP management

Agency Operations

Unprecedented insight into agency performance

- Commission tracking
- Agency insights reporting

Quoting & Proposals (CPQ)

Price configuration, quoting & plan marketing

- Configure your plans
- Price out options
- Quote and proposal creation

Client Cloud

Better serve your clients & your bottom line

Compliance

Tools to mitigate client risk

- Content library
- Compliance assets
- Notices & wrap documents

Education & Training

Comprehensive training & education

- Client portal
- Learning management system
- Employee handbook builder

People Management

Unique HR resources & tools

- HR apps
- Employer hotline

Enrollment & On-boarding

Simplify the entire enrollment process

- Enrollment booklet builder
- Benefits administration
- HR information systems

Content Cloud

Harness the power of content to drive growth

EB Content Packages

Curated content for your benefits practice

- State and Federal Compliance
- Human Resources
- Education
- Wellness
- Employee communication
- Broker Insurance Insights
- Premium content

Content Access

Deliver the right content instantly

- Smart content delivery
- Content groups
- Content exploration

Producer Training Module

Get producers up & running in no time

Content Management

Upload & customize your agency's content

- Agency branding
- Agency-owned content
- Customizations
- Administrative tools

3rd-party Integrations

Integrated with leading third-party apps

- Content displayed in your existing systems
- Smart content recommendations
- Workflow optimization

Analytics Cloud

Claims & loss analytics made easy

Decision Master Warehouse + Planadvisor

Help control healthcare costs

- Health plan design benchmarking data
- Renewal estimator tool
- Plan Selector tool

Grow with health claims analysis

- Comprehensive benchmarking
- Customizable reporting
- Disease profiler tool