A COMPLETE AGENCY MANAGEMENT SOLUTION

Benelinx

Brilliantly Bundled

www.Benelinx.com | 888.227.1602

Benelinx is a complete agency management system for the employee benefits industry. Unlike other software solutions, Benelinx automates the full insurance life cycle to save time and increase revenue.

Transform the way you do business.

Increased Client
Retention

Stronger Carrier
Relationships

More Time For The
Work You Love

Added Cross-sell
Opportunities

Happier, More
Productive Employees

Greater Client
Trust

Powered by Salesforce, **Benelinx** consolidates your data and workflow in a single, centralized solution to help you stay connected.

■ Everything You Need

Workflow Automation – Eliminates out-dated 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.
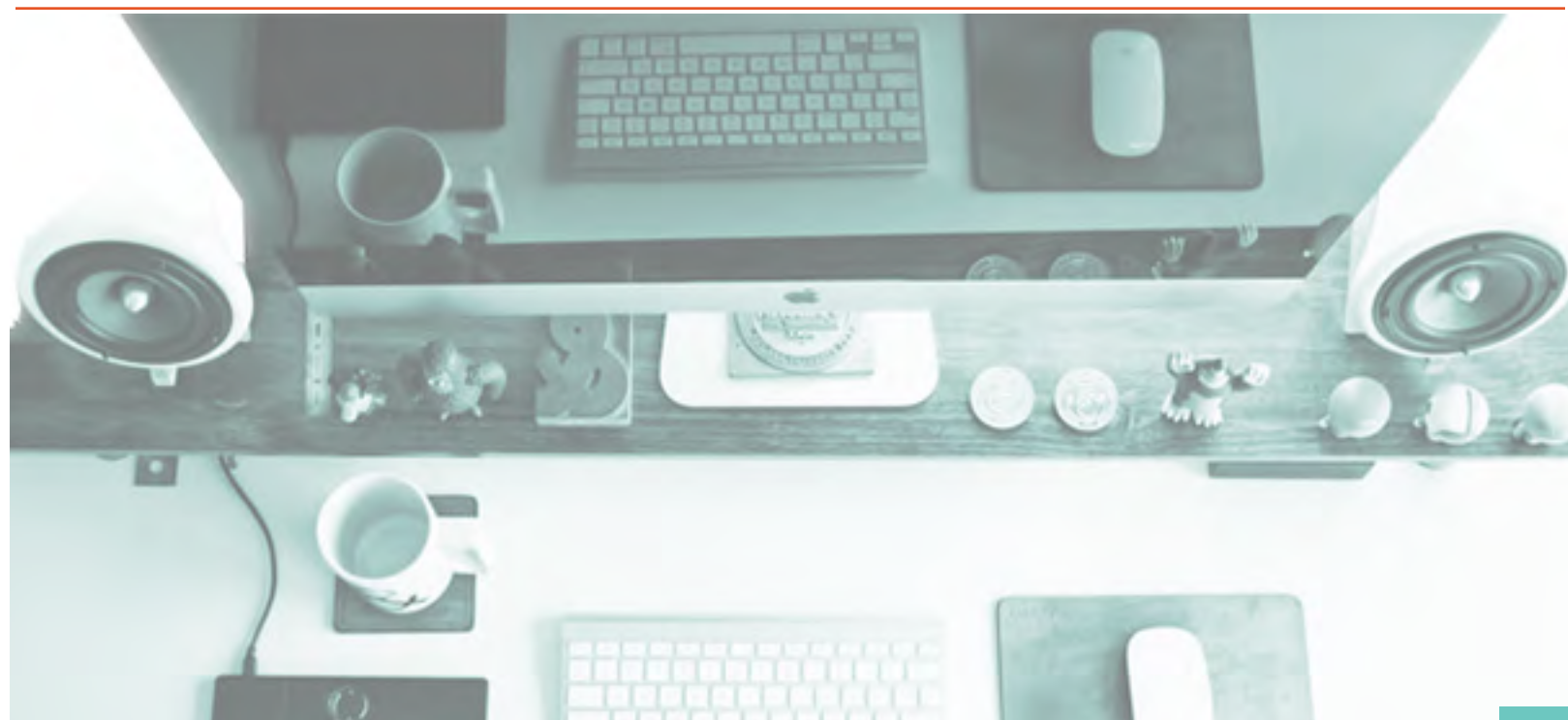
Executive Dashboard – Create multiple dashboards to visually illustrate data at the click of a button.

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.

Stay connected with our centralized system.

In today's crowded marketplace, providing exceptional client service is key to success. We make it easy.

Don't waste time on outdated systems and manual data entry. Benelinx consolidates your workflow into a single, intuitive platform.

○ **Create visual reports at the click of a button**

○ **Access data in real time as it's added to the system**

○ **Easily manage your team's workflow and client services needs by stage, account executive, and client**

○ **Manage the market proposal process from census, to quote, to client plan selection**

Embrace the power of data...

Trust is at the core of everything you do. You've spent years building trust with your team, carriers, and clients – it's how you do your job.

BUILD BETTER RELATIONSHIPS

Harness data to strengthen the relationships that matter most.

Carriers
Leverage competitive data and easily track commissions.

Employees
Reduce admin time to boost productivity and job satisfaction.

Clients
Empower clients with data-driven tools and 24/7 access.

...to grow trust at every level.

The data and tools you need to better serve your clients, staff and carriers are just a click away.

Your Carriers: Go from broker to trusted advisor.

Commissions
Reporting
Dashboards
Client Community

- Track commissions and remedy incorrect payments.
- Forecast and plan for annual bonuses.
- Outline product portfolios and identify gaps.
- Easily break down client demographics by SIC code, location, and size.
- Provide carriers with competitive data.
- Increase client's perceived value of the carrier.

Your Employees: Help your team thrive.

Quote to Sold
Market Proposal
BAG
Client Community

- Highlight your team's accomplishments.
- Significantly reduce admin time to take the fear out of daily tasks.
- Increase efficiency.
- Reduce employee stress, especially during the busy season.
- Retain your most valuable employees.

Your Clients: Prove your value.

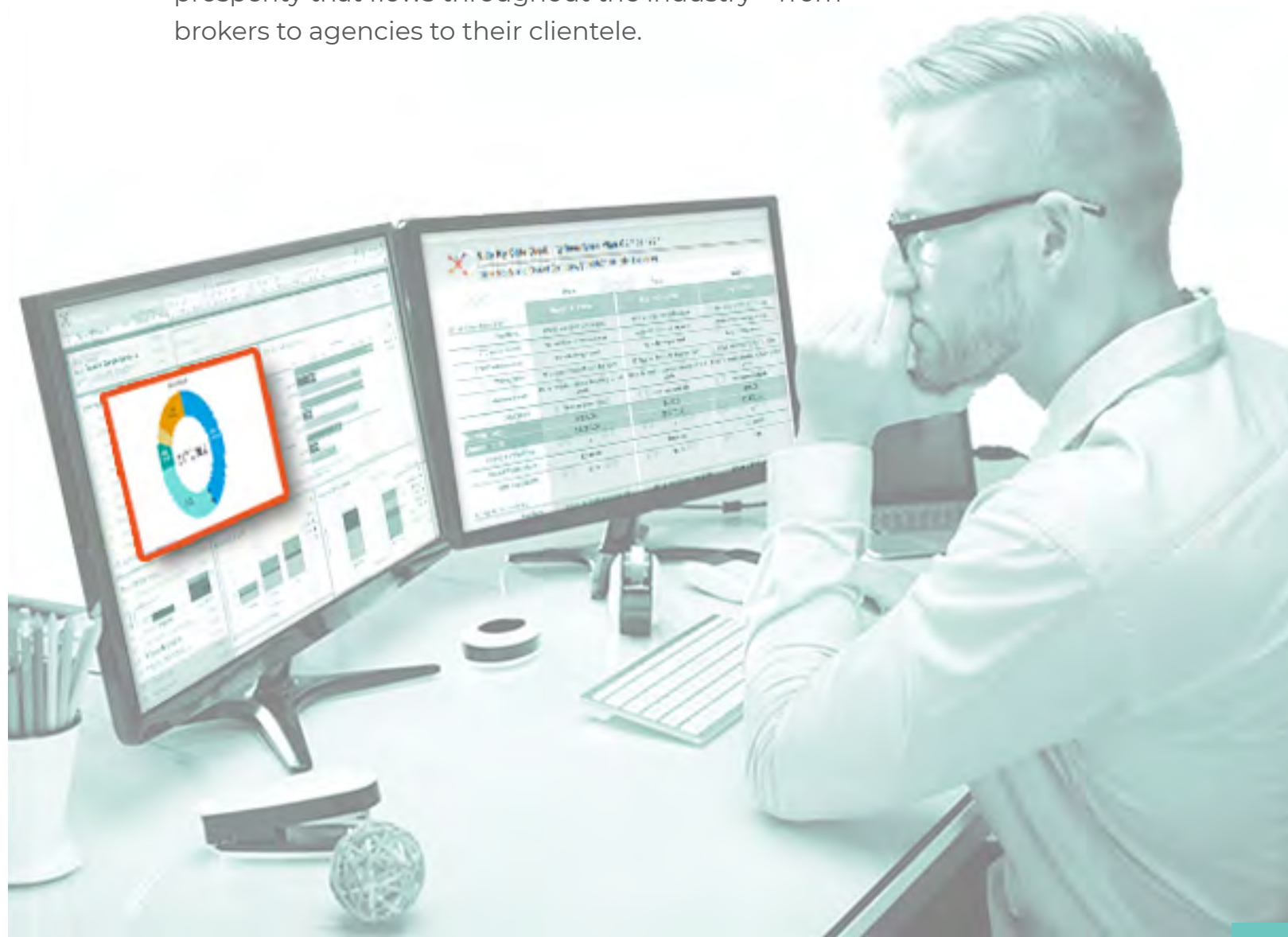Quote to Sold
Market Proposal
BAG
Client Community

- Provide 24/7 client access to key contacts and information.
- Empower clients through helpful tools.
- Build client trust through improved accuracy and efficiency.
- Harness data to provide critical business strategy and recommendations.
- Prove you are a trusted partner.

Harness technology to grow your business.

It's time to embrace a better way. We're helping transform the employee benefits industry through new technology and innovation.

Benelinx cuts out the clutter and lets you devote energy to what matters. The end result? Growth and prosperity that flows throughout the industry – from brokers to agencies to their clientele.

THE POWER OF
SALESFORCE

We've leveraged Salesforce's proven CRM system and built a highly customized software solution to help effectively manage your entire agency.

Opportunity Through Constant innovation

Our highly customizable platform equals endless possibilities for improved performance and growth.

Infrastructure To Stay Ahead Of The Curve

Proven security and reliability, and best-in-class architecture to provide customers with a complete agency management system.

A Turnkey Solution For All Agencies

Seamless integration with new and existing Salesforce accounts provides instant access to existing data and workflows.

APPEXCHANGE

salesforce

2019

PARTNER

Visit us on the AppExchange

www.Benelinx.com/appExchange

It's time to embrace a better way.

Learn how to automate your employee benefits agency and grow your business. Why wait?

call or visit today

www.Benelinx.com | 888.227.1602

Benelinx

Brilliantly Bundled