

## Boost your benefits business

BenefitPoint helps you standardize and automate processes and workflows, report and track revenue, and become a trusted advisor to clients and prospects so you can provide an exceptional customer experience and expand your benefits business.

### Features you need

- **Capture lost revenue:** With **Revenue Tracking & Reconciliation**, you can upload carrier statements electronically and your estimated revenue is matched with actual receivables, so you can quickly identify lost revenue.
- **Become a trusted advisor to clients:** **Plan Attribute and Premium Comparison** enables you to present prospects with a comparison of attributes and costs from multiple plans, so they are better able to understand their options.
- **Make data-driven decisions:** **Stewardship Reporting** gives you a complete view of your business with executive and financial reporting.
- **Gain a competitive edge:** **Real-time Benchmarking** enables your producers to show clients where their benefit plans stand in relation to the industry—or other companies within their industry.
- **Offer prospects the best options:** **RFP Management** helps you cast a wide net by submitting RFPs to a range of carriers and negotiate with those carriers to give customers the best options.

### Some customers have seen potential for

- **2-6% annual revenue increase** with recovered revenues.
- Reduced average time to get RFPs out to 6-7 carriers **from 1-4 hours to now just 20 minutes.**
- Reduced time spent on reporting **from 8-16 hours a month to 1 hour per month.**
- **95% reduction** in costs for external benchmarking reports.

"Since implementing BenefitPoint, we are regularly collecting \$30K each month in missing or short-pay revenue. It has been a great help to our bottom line."

**Becky Barth,**  
Systems Administrator and Trainer, PSA Insurance and Financial Services



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Interested in learning more? Please reach out to your Vertafore Account Team, Elizabeth and Elise.

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