

Gaining a New Client Through our Innovative Approach

A locally owned, small business with 28 employees in Bellmore, New York.

Key Challenges

One of our account executives had met with this prospect several times over the past few years, attempting to become their new benefits consultant. The business owner had responded each time by saying that they were satisfied with their current broker and wouldn't be making any changes. On the most recent visit, however, the account executive learned that the owner ceded oversight of the company benefits to a newly hired human resource director and this person agreed to a presentation.

MBA Solution Presented

In our meeting with the human resource director we explained our process and resources in great detail, explaining how our approach to benefits consulting was thorough, innovative, utilized cutting-edge technology and provided our clients with expansive resources. We outlined how we:

- Utilize analytics to select benefit plans, assuring the right fit based on the unique demographics and needs of the company
- Provide relief for HR and management by answering all benefit related questions for employees, resolving difficult claims problems and providing a benefit administration application featuring employee self-serve functionality
- Provide assistance to maintain compliance on a number of human resource and benefit regulations
- Integrate proven cost-containment features into benefit plan design, including telemedicine, wellness programs and worksite benefits
- Provide regular communication directed at employee education and allow employee interaction through regular on site presence

Measureable Results

After comparing our services to that of the incumbent broker, the HR director persuaded the company owner that bringing us in could enhance the services provided without additional cost. We were provided the broker of record.



After implementing our products and services and utilizing our expertise to re-align and enhance their benefit program prior to their next plan anniversary, we were not only able to reduce the workload of the HR staff, but also able to produce a first-year savings in excess of \$17,000.