Your InsurTech Software for Employee Benefits

MY DASHBOARD

Visual information management tool that displays and tracks business data enabling users to monitor key performance indicators (KPIs) and provides actionable insights.

TASK MONITOR

Workflow tool for prospecting, sales, customer service, & renewals - tracking tasks from beginning to end, delegating subtasks to team members, and setting deadlines to accomplish work on time.

CLIENT PROFILES

Supporting your team with simple pre-configured organization of client information from various sources, crucial to improving service efficiency, financial results, and your team and client experience.

CONTACTS

Basic company information including names, phone numbers, & emails of your business and insurance networks, with automated features connecting to the quoting and renewal processes.

EMPLOYEE BENEFITS

Easy-to-use processes for Employee Benefits Programs from quote templates, selection of insurance companies, to insurance quote requests, and annual group policy renewals.

GROUP RETIREMENT

Providing solutions for Group Savings and Retirement Programs, from quote templates to insurance company quote requests, and annual client policy reviews.

QUOTES / RFP

Automated request for quotes process for submitting & accepting bids, using pricing spreadsheet builder, generating line-by-line report & recommendation, and closing with a mark as sold function.

RENEWALS

Analysis system that accelerates qualified pricing audits, taking into account: factors, future risk mitigation, contractual agreements, insurer factors benchmarking, and consumer's willingness to pay.

INDIVIDUAL INSURANCE

Simplified tools for cross-selling various Individual Insurance products, including Life, AD&D, Critical Illness, Disability, Health, Dental and Travel Insurance.

RESOURCE CENTER

A powerful collection of resources organized to assist in day-to-day operations, including document templates, insurance providers catalogue, professional associations and government resources.

Helping Insurance Professionals SELL-SERVICE-RENEW Canadian Employee Benefits

COMMISSION TRACKER

Compensation management module providing accurate and in-depth insights on revenue, commission data, detailed reporting, and compensation of sales representatives.

NEWSLETTER BUILDER

Communications tool that allows you to create customized interactions pertaining to your business, products and services, to increase client retention and sales.

MY GROUP ROBO

Digital platform that automates direct sales and service processes for “Broker to Business” and “Group Account Executive to Broker” activities, requiring minimum human supervision.

BUSINESS DEVELOPMENT

Build a better business with strategic tools, such as target sales numbers, work scheduler, and new business processes.

BUDGET

Simple calculations of revenue and expense forecasts that consider both the organizational and team level budgets, assisting with planning and increasing overall profitability.

HUMAN RESOURCES

Range of solutions to assist with managing internal brokerage Human Resources functions, including policies, attendance management, and staff pay scale compensation.

COMPLIANCE

Assistive tools tailored to your organization by insurance product lines that follow necessary regulations, industry standards, and business code of conduct.

REPORTS

Easily find various data-driven insights and run reports to view business intelligence and utilization performance.

BROKER SET-UP

Manage your account details through your Site Administrator access settings, including branding, permissions, staff teams, agent codes, tags, service categories, subscriptions, and payments.

MY DETAILS

Registered user profile information including Licence statuses and continuing education (CE) credit process tracking.

NOTIFICATIONS

Advanced status reminders on important expiry dates for E&O and Licence Renewals that continue to display until users complete the required action.

HELP VIDEOS

Tutorial videos with short instructions on how to use various features of the software.

www.beneoffice.com

Tel: 519-453-5024 Email: sales@beneoffice.com