

## 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



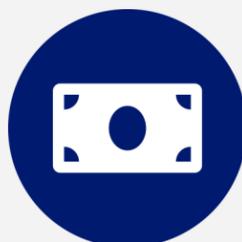
Basic company information including names, phone numbers, & emails of your business and insurance networks, with automated features connecting to the quoting and renewal processes.

## 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.

## 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



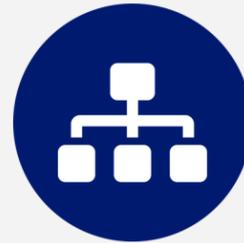
Build a better business with strategic tools, such as target sales numbers, work scheduler, and new business processes.

## 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](http://www.beneoffice.com)

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