



## Corporate Overview

### Benefits And Human Resources Technology Consulting For Employee Benefits Brokers And Their Clients

#### ABOUT HRT

While working with over 200 employee benefits brokers, HR Technology Advisors (HRT) has established itself as the premier national, independent benefits and HR technology consulting firm focused entirely on serving the needs of employee benefit firms and their clients. HRT deploys technology solutions for employers that streamline human resources & benefits delivery processes, and technology to improve the internal efficiencies of benefits brokerage firms.

#### MISSION

HRT helps employee benefits brokers win and retain more business by expanding their HR and benefits technology capabilities and thereby increasing their value proposition to employers.

#### FOUNDED

- As Benefits Technology Group in 2001
- Reorganized as HR Technology Advisors in 2006

#### UNMATCHED EXPERIENCE

The HRT management team has over 50 years of collective experience in deploying benefits and human resources technology solutions. HRT has analyzed hundreds of vendors and implemented technology to over 250 employers through more than 20 different vendors. Our experience is unmatched in the industry.

#### What Our Clients Are Saying...

"I just wanted to shoot you a quick e-mail to say a quick and sincere thank you. I can't tell you how much I appreciate you meeting with us and taking the time to get a true understanding of our needs. I felt entirely relieved as I left the room, and I'm looking forward to continuing to work together."

"You are the expert not only in the HR technology field, but from the sales / management side of business as well. I anticipate learning an enormous amount from you, and am extremely excited to dive in to this!"

"HRT has enabled my practice to offer large company technology to my smaller company employers. I personally do not have the time to research all the products in the market. What I like the most is that it is not an all or nothing approach."

## Products and Services

### CLIENT-SIDE TECHNOLOGY STRATEGIES FOR BROKER PARTNERS

HRT broker partners gain a competitive edge by offering their clients more technology choices, increasing their ability to service their employer clients, and solve more human resources and benefits delivery problems with our proven consultation strategy.

As an independent, objective resource on benefits and HR technology, HRT helps brokers and their clients define their needs and find the right solution.

Some solutions include:

- Benefits Websites
- Company Intranets
- Web Enrollment
- HR Systems
- Benefit Statements
- Consolidated Billing
- COBRA Technologies
- FSA Technologies

### BENEFIT BROKERAGE SYSTEMS

HRT has developed systems for brokers to use internally to fit the business needs and workflows of the employee benefits brokerage vertical market.

### SAGE SALESLOGIX



These complete customer relationship management (CRM) solutions provide all of the tools and capabilities needed to create and easily maintain a clear picture of customers from first contact through purchase and post-sales.

For more information, visit [www.benefitsbrokeragesystems.com](http://www.benefitsbrokeragesystems.com).

## Client-Side Technologies

### Features

Our Broker Partners instantly gain a competitive advantage by accessing a broad range of benefits and HR technology solutions. An expanded offering combined with discounted pricing, access to a shared service and implementation center, and the support of expert technology consulting services differentiates our Broker Partners in their marketplace.

### BROKER STRATEGY

The broker market is competitive. We help brokers develop a strategy to position and offer technology to win new business. The strategy includes working with management to design marketing tactics, staff education, and continued staff training.

#### Strategic Development:

- Competitive Positioning
- Marketplace Overview
- Education
- Webinars
- Ongoing training

#### Marketing Support:

- Brochures
- Presentation Design
- Website Incorporation / Sample Content
- Client Questionnaire
- Surveys

#### Access Online Tools:

- Technology advisor tools
- Business case model
- Marketplace trends
- Vendor information
- Sales tools

### SHARED SERVICE CENTER

Deploying technology is not what brokers do. HRT is staffed with skilled and experienced professionals who work with your clients to make sure the technology is deployed correctly and on time, allowing your agency to do what you do best.

- Implement HRIS Systems
- Implement Web-Enrollment Systems
- Other Solution Implementation
- Build Benefits Statements
- Build Benefit Websites
- Project Planning
- Data Management
- Third Party Integration
- Training
- Ongoing Service
- Broker Connectivity
- And More...

### PREFERRED VENDORS

When it comes to benefits and HR technology, many employers do not know which systems are available and simply want a broker to bring a solution. In some markets, the competitive broker environment has created the demand for brokers to have a solution "in their back pocket" that can be deployed rapidly. HRT Preferred Relationships enable brokers to bring products and services to their clients more quickly and at a lower cost.

- Best-of-breed vendors
- Pre-negotiated discounts
- Extended product offering
- Aggregated buying power
- Saves you money
- Saves your clients money

### EXPERT TECHNOLOGY CONSULTING

Our benefits and human resources technology consultants have over 50 years of combined experience. Most brokers have none. Having experts on your side creates a clear competitive advantage.

- Diagnose current capabilities
- Pinpoint potential gaps
- Identify unique HR and benefits delivery wants and needs
- Vendor selection process
- Benefits Enrollment
- HR Systems
- Benefits Outsourcing

### Benefits

- Position your firm to win
- Never worry about benefits and HR technology again
- Extend your team with ours
- Increase your technology options
- Technology experts on your side

### Solution Categories

Expand Your Technology Offering, Reduce Risk, Increase Buying Power, Leverage Our Shared Knowledge and Service Base:

- Applicant Tracking
- Benefits Enrollment
- Benefit Statements
- Benefit Websites
- Benefits Outsourcing
- Claims Analysis / Management
- COBRA
- Company Intranets
- Compensation
- FMLA
- FSA Technology
- HR Administration
- HR Outsourcing
- HRIS
- Learning Management
- Payroll Services
- Performance/Talent Management
- Recruiting
- Time & Attendance
- Wellness

## Benefit Brokerage Systems

### Features and Benefits

#### MARKET-LEADING SOLUTIONS

HRT develops and distributes Customer Relationship Management (CRM) systems from Microsoft and Sage Software for brokers to use internally to fit the business needs and workflows of the employee benefits brokerage vertical market.

#### BENEFITS AGENCY MANAGER FOR MICROSOFT DYNAMICS CRM

HRT is the only Microsoft certified solution for the Employee Benefits Brokerage vertical market.

#### SAGE SALESLOGIX FOR EMPLOYEE BENEFITS BROKERS

With over 100 system implementations, HRT is the #1 vertical market reseller of SalesLogix.

#### CORE CRM FUNCTIONALITY

##### A Single Information Source

- Workflow development
- Campaign management
- Automated sales processes
- Service issue tracking and resolution
- State-of-the-art technology platforms
- Customizable environments
- Product support

##### Flexible Systems integration

- Outlook®
- Word®
- Excel®
- PDA / mobile
- Phone
- Fax
- And more

#### PRE-CONFIGURED FOR EMPLOYEE BENEFITS BROKERS

##### Prospecting

- Prior plan data
- Track competitors
- Develop RFP's
- Track markets quoted
- Attach documents to opportunity
- Report on carrier response times

##### Policy Management

- Track current carriers
- Track current coverages
- Track renewal dates
- Track in-force terminated policies
- Track fully and self-insured rates, history
- Capture contribution amounts
- Attach policy documents
- Build plan data
- Track notes by policy
- Capture eligibility rules

##### Service Management

- Manage Service tickets by account
- Track service tickets by policy, contact, type, carrier, account manager, issue date
- Define service issues for reporting
- Run total service report
- Track notes and activities by issue
- Track turnaround times
- Email service issues
- Attach documents
- Time setup and date stamp
- Assign to others
- Allow customer access

##### Renewal Management

- Streamline and build RFP's
- Track key dates
- Track quote status by carrier and coverage
- Track activities, notes and completed activities
- Run Renewal reports
- Build proposals



- Over 15,500 customers from small to enterprise
- Over 750,000 users in more than 80 countries
- Global network of software and services partners
- Integrates directly into Outlook® and other Microsoft Office® applications
- Employees work within familiar Outlook environment
- Rapid adoption
- Tools for managing sales, services, and marketing processes

### SAGE SALESLOGIX

- Worldwide Leader in Small-Medium Business Applications
- Over \$1 billion in revenue (Sage Group plc)
- Over 2.3 million customers in North America
- U.S. Leader in SMB CRM with 25% Market Share\*
- Approximately 7,500 Companies
- More than 330,000 users
- Professional Call Center staffed with approx. 100 dedicated employees

\*Source: Gartner 2004