

CUSTOM SOFTWARE AUTOMATES PROCESSES TO SCALE WITH EXISTING STAFF

CASE STUDY

Legacy CRM & Manual Systems Bottlenecked Operations

CUSTOMER PROFILE: FLEXIBLE BENEFIT SOLUTIONS INSURANCE BROKERAGE INC.

Newburyport, Massachusetts	Founded in 1997	Licensed full-service insurance agency for companies in Massachusetts and New Hampshire	Offers employer-sponsored products, voluntary 100% employee-paid benefits, property and casualty
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KEY CHALLENGES:

- 1. Static, difficult to customize desktop CRM
- 2. Additional staff would be required to collect, enter and manage customer data
- 3. Tedious and error-prone manual processes

SOLUTION:

PURPOSE BUILT CREATES A CRM SPECIFICALLY FOR BENEFIT BROKERS FROM SCRATCH.

TOP BENEFITS:

- 1. Cloud-based, current, customized CRM
- 2. Software automates collection, inputting and management of customer data to eliminate need for additional staff
- 3. Fine-tuned for employee benefits operations

Steve Linteris knew he had to abandon his long-time, legacy CRM in favor of new technology when he realized hiring staff would soon be his only alternative in an increasingly competitive business environment.

"I contracted Purpose Built to create industry-specific software rather than use the unbelievably convoluted, complicated off-the-shelf tools that were built by programmers who don't understand the insurance business," says Linteris. "Flexible Benefit's new OfficeLink 360 software, which was developed to our specifications, saves time, improves accuracy, adds value and serves as a key differentiator without increasing my company's headcount."

As Linteris explains it, he sees himself as OfficeLink 360's "non-technical founder" – the visionary who knew exactly what his company and industry needed but lacked the technical know-how required to build it. Purpose Built effectively translated his vision into a powerful, real-world application. Flexible Benefit was able to use OfficeLink 360 within a month of starting the process in 2015 and OfficeLink 360 continues to evolve with constant input from Flexible Benefit's internal and external users.

"The routine administrative tasks are outsourced to OfficeLink 360 so that Flexible Benefit can focus on what it does best – delivering the insurance- and benefits-related insights that add value for our customers and their employees," says Linteris.

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"I went all in to get a truly paperless, automated, cloud-based CRM and benefit administration system that easily tracks and stores as many customers and their respective benefit lines and employees as I need," says Linteris. "My previous CRM was customizable, but it would take a rocket scientist to actually do it and on top of that, it really slowed Flexible Benefit's computer systems."

Fully automating the bulk of the administrative tasks, creating instant access to accurate real-time, relevant customer and carrier data and freeing up both computer and human resources made good business sense. However, the more Linteris researched the available, off-the-shelf technology, the more he found it lacking.

He also learned that while his existing CRM provider offered a cloud-based version that would free up his hardware systems, the monthly cost was astronomical and it still didn't have the capabilities he required, for example, providing a dashboard interface for his clients.

As a result of the Flexible Benefit and Purpose Built collaboration, OfficeLink 360's onboarding wizard automatically collects the critical employee information directly from customers' employees. This expedites and streamlines the process while reducing data entry errors. It also ensures that all required form fields are filled out for each application, and allows the employees to add their signatures to documents using their fingertips.

"We're not struggling to read people's handwriting, trying to decipher fourth-generation scans or wasting valuable time chasing down missing information like signatures, doctor's phone numbers or children's names and birth dates," says Linteris.

Not only is OfficeLink 360 an incredible time saver, it provides accuracy, expedites document processing, and eliminates the need to manage and store massive volumes of paper. After testing it, Linteris' broker colleagues report it's incredibly intuitive and meets their needs.

"OfficeLink 360 works because Purpose Built is wonderfully responsive, approachable and their team knows how to relate to and work with people that aren't technology geeks," says Linteris.

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