Growing Your Agency
With BerniePortal

A BERNIEPORTAL BROKER SUCCESS STORY

BerniePortal

Blake Butler at Team SJB describes how BerniePortal has allowed them to provide more strategic benefits and HR support to their clients.

## Blake Butler, Team SJB
BerniePortal User

About Team SJB

Sheila J. Butler & Company (SJB) is a health insurance brokerage headquartered in Carrollton, Georgia, that has served small, mid-size, and large groups for over 25 years. The SJB team represents more than 20 top-ranked carriers and is consistently ranked among the top 10 brokers/agents in the state, having earned one of the highest retention rates in the industry.

About BerniePortal

BerniePortal is an all-in-one HRIS that helps small and mid-sized employers solve the strategic and transactional challenges of healthcare and HR. More than just a tool to simplify benefits administration, BerniePortal also tackles applicant tracking, onboarding, PTO tracking, time & attendance, compliance and 1095-C reporting.

Visit www.BerniePortal.com to learn more!
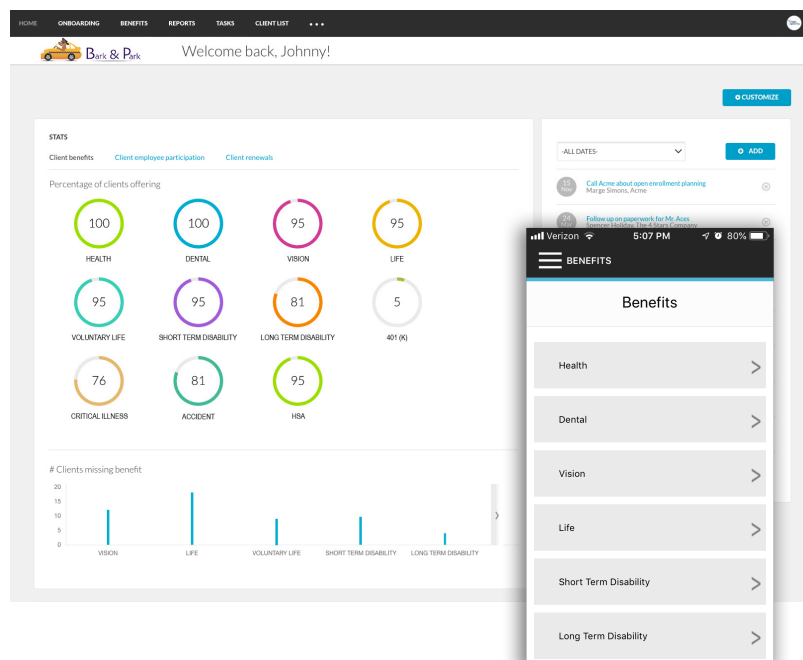
This interview has been edited and condensed for clarity

Q&A WITH BLAKE BUTLER

Q1: **Over the past few years, we've seen the needs of small and medium-sized employers expand to include transactional HR challenges. Have you seen this at your agency?**

We've always been a solution-oriented brokerage in providing support and compliance assistance around COBRA and State Continuation, onboarding and new hire checklists, off-boarding, enrollment forms, etc. The problem with maintaining a solid reputation with existing clients and growing our block of business was the time consuming, paper-based systems and processes we had created internally to keep up with these growing transactional needs.

> *We couldn't grow if we continued to try and solve these multi-faceted needs with our manual processes.*

We were investing a lot of time recreating the right forms each year, keeping up with changes made, working with the employer to chase down forms and ensure accurate information was being collected. The small employer segment was becoming unprofitable for us. We realized that we couldn't grow if we continued to try and solve these multi-faceted needs with our manual processes and offer the same level of service our customers were accustomed to at the same time.

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Q2: How have you provided a solution for those operational challenges?

We had begun to discuss whether or not we could even continue to offer these types of services and support when we discovered BerniePortal. After what felt like a thousand questions, we made the no-brainer decision to move from our former benefits administration system to BerniePortal's all-in-one HR and benefits solution.

Switching platforms allowed us to move entirely away from paper based solutions and offer first-in-class HR features to our employer clients who might have been searching elsewhere for a system to satisfy those needs. Our clients have welcomed the change with open arms. Together we aren't spending countless hours using antiquated systems or chasing down paperwork.

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> *We made the no-brainer decision to move from our former benefits administration system to BerniePortal's all-in-one HR and benefits solution.*

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Q3: **With BerniePortal handling the administrative processes of HR, are you able to be more strategic with the advice and value you provide for your clients?**

In the past, our Account Managers would spend most of their time preparing forms and creating compliance resources for employers. Now with BerniePortal streamlining the numerous HR operations and processes, we can instead focus on making sure we have the best possible strategy in place for every client, every year. We're able to spend more time benchmarking, discussing emerging thought leadership, and the best part – taking the pain out of Open Enrollment each year.

Q4: **How do you see BerniePortal helping you increase revenue in the years to come?**

The first year on BerniePortal was spent transitioning our current and new clients to the system. Now that we're into our second year, we're exploring all the beneficial product integrations and features the platform has to offer. For example, we're utilizing BernieBill which includes direct carrier integrations for billing and eligibility, resulting in less time spent on administration and error correction and more time on business development outreach to grow our agency.

BerniePortal has made it easier than ever before to satisfy the needs of current clients, like quickly adding lines of coverage or offering a time tracking system, and also recruit new customers who are looking for a streamlined HR and benefits solution.

> "
> *BerniePortal has made it easier than ever before to satisfy the needs of current clients...and also recruit new customers.*

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Q5: What's the benefit of having your clients on an all-in-one HR and benefits system like BerniePortal instead of using multiple single solution systems?

When the online benefit administration system craze began about 10 years ago, we allowed our clients to pick their own systems. We had clients choosing vendors all over the map. In most cases we had little to no access to these systems. The employer essentially became a middle-man and ended up doing a lot of the work themselves – not good. Also, when the system did not operate correctly or the vendor made a mistake it would always fall back on us as the broker.

With BerniePortal, we can remove the burdens that our agency experienced in the past to allow for more time providing the strategic support and value that our clients need.

Our clients want a pain free experience. They want to be able to lean on us to handle the details. Offering one system to all of our clients allows us to give them just that. With BerniePortal, we can remove the burdens that our agency experienced in the past to allow for more time providing the strategic support and value that our clients need.

BerniePortal

Interested in learning how BerniePortal's all-in-one HRIS can help your agency?

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