



BERNIEPORTAL



THE ADVISOR SUCCESS DIFFERENCE

What sets BerniePortal apart from the competition is our **full-service approach and partnership**.

We are committed to a successful implementation of our software at your agency and for your clients and have a dedicated Advisor Success team of BerniePortal experts **available every step of the way** from marketing to build-outs to troubleshooting and everything in between.

Advisor Success: What we do for our broker partners

Their success is tied to your success	A portion of each team member's compensation relies on your implementation and satisfaction with BerniePortal.	✓
Direct email vs. generic handle	The difference between having a dedicated Advisor Success team member versus calling into a general support pool with a competitor is day and night.	✓
Prospect demos	We recently signed a new client and before they got to training, they'd already won four new groups due to their new Advisor Success team member providing a BerniePortal demo for those prospects.	✓
Client demos	Our team will help you with client demos to speed up the uptake of the new system.	✓
Dedication	All of our partners have a dedicated Advisor Success team member to make sure you have access to the ongoing relationship, technical, and sales support you need.	✓
HRIS education	As the advisor world evolves and brokers become more HR Support centric, we will be your go-to support for HRIS solutions, tools, support, and advice.	✓
Redundancies	What if someone goes out in Q4 (or anytime) on leave and you need backstop/support to handle build-outs?	✓
1095-C support	Following renewal season, it is a huge relief to have support on something that can be confusing and very technical.	✓

Relief in Q4	Busy season can have you swamped. Let your Advisor Success team member take build outs off of your plate, whether new implementations or just renewal accounts.	✓
Support to fix things “on the fly”	Our clients place a lot of trust in their Advisor Success team members. That trust extends to calling them in the midst of open enrollment meetings when a group asks to change something. We take pride in being on the other end of the phone to make the change in real-time.	✓
Build out the portals	We will assist in every single employer build-out you need from us - not just on the first client. That is true at implementation as well as at each renewal.	✓
Comprehensive training tracks	From set-up and software training to best practices around how to incorporate BerniePortal into your agency’s sales process, our team hosts initial training courses, as well as holds monthly 1-1s with our partners.	✓
Staying up to date with improvements and advances	Other platforms will send out blanket emails. That is nowhere near as effective as having someone who is here, sitting around other specialists who do nothing but BerniePortal all day, and who sees themselves as an extension of your team. You have a BerniePortal specialist thinking about you and your firm all the time, making sure you stay up-to-date with best practices.	✓



*Many companies talk about ‘partnerships’ but some seem to not deliver when it’s needed the most. **BerniePortal has always delivered.** Everyone at your firm that we have dealt with has always made us feel like we are your only client whenever we’ve had questions or needed help.*

RALPH WHITEHURST
President

GOLSAN SCRUGGS

*The team behind them is a very friendly, very educated group of folks.
The customer service has been excellent.*

PETE SCRUGGS
Principal



Don’t just take our word for it — BerniePortal was recognized by the Stevie Organization with a Stevie Award for Customer Service just this past February!



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www.BerniePortal.com