

Considering BerniePortal?

Read one broker's perspective.



PETE SCRUGGS

Meet Pete Scruggs, a Principal at Golsan Scruggs and a user of BerniePortal. Below is Pete's experience with BerniePortal.

The following interview has been edited and condensed for clarity.

Why did Golsan Scruggs choose BerniePortal?

P.S. BerniePortal was a strategic play for us from the standpoint of trying to simplify our clients' lives. What we liked about it most was the ability to simplify simple things, like benefits and benefit notices, and allowing there to be online signatures for things that you typically have to hand out, and maybe employees might not even keep. How can we have all the data in one spot to really do a great job of answering the client's questions on their first phone call...and have some organization of notices and enrollment and at-a-glance see what's going on with their plans?

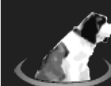
ABOUT BERNIEPORTAL

BerniePortal is an all-in-one online HR platform that helps small and medium-sized employers solve the transactional challenges of HR with software and the strategic challenges of healthcare with a trusted advisor. Built by brokers for brokers, BerniePortal tackles onboarding, PTO tracking, time and attendance, compliance, benefits administration, 1095-C reporting and COBRA. BerniePortal is supported by a network of healthcare advisors and brokers nationwide—including the team at Golsan Scruggs Insurance and Risk Management in Portland, Oregon.

Interested in learning more about how BerniePortal can help your agency?

Request a demo!

Call us at: **1-844-218-0909**
Visit: www.BerniePortal.com



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Are you seeing more employers looking to go online?

I think we're living in a world that's more data-driven and more "quick-demand." People want to be able to see things and use things online, so BerniePortal has been a great fit from that standpoint. Certainly a lot of employers pay a tremendous amount of money—we have some clients that have paid over six figures—for online bundled experiences, which are payroll and benefits and other HR functionality, so there is a desire to get that online. [BerniePortal's] attractive interface is something employees can see if they're doing their online enrollments, but it also allows us to have a key role in interpreting that for them. It's been a good combination that allows us to provide a really high-end technical solution for our clients and yet, we're still a trusted advisor on a day-to-day basis.

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What is the benefit of BerniePortal from an ancillary benefit perspective?

[BerniePortal] is rolling out some unique alliances with AllState and different vendors where they get preferred terms across their book of business. In essence, we're an aggregate getting a better deal in terms of participation requirements. The volume of all the people on BerniePortal is to the benefit of each agency, because of the mass purchasing power. I think that will probably grow, from what I can see. It's an attractive position for the carriers to have access, kind of in one fell swoop, to more people.



What, in your opinion, sets BerniePortal apart from its competitors?

The key decision point for us was that it was not going to require us to staff up. It doesn't require a full-time person just to build the benefit portals for our clients. That's one of the strengths of BerniePortal. The team behind them is very friendly, very educated group of folks. We've had really good responsiveness in terms of not just getting back to us on questions, but being proactive. The customer service has been excellent.

I think another thing that we liked from the start, philosophically, is that it's a system built by brokers for themselves, and now it's being rolled out nationwide to other brokers. We saw that there would be value in [BerniePortal sister company, brokerage Bernard Health] having the vested interest in making sure it's functional. You can see that they are living in it, that they're having to manage the clients in the system, too. There's something about that that really makes it simpler and cleaner. *If you've got to live in your own house, you know, you keep it tidy.* So they're managing their client accounts, they see the things that work or don't work, and the things that aren't working get fixed, because they've got to live in the system too.

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Bring your clients online with BerniePortal's HR and benefits administration.

To request a demo of BerniePortal:

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