



BERNIEPORTAL
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Bought the Wrong HR Platform?

Don't Panic!



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Picking the wrong benefits administration platform is incredibly frustrating. We know the possibility of a limited return on investment is what keeps many brokers from going online in the first place. That said, it does happen, and it can be truly painful to invest time and money in a new platform and have it not live up to your expectations.

Understandably, that experience can leave brokers wary of seeking out another benefits administration platform, but inertia can make a bad situation worse. Remember, at the beginning of this process, you saw enough value in getting your agency online to embark on and complete the buying process. That value still exists, but you may need to find a different vendor to help you find it.

As disappointing as it can be to pick the wrong platform, many brokers have been in your shoes. We wrote this guide to help agencies work through this process. Don't let one bad experience impede your plans of less paperwork, more efficiency, and more value for you, your agency and your clients.

So if you're feeling like you may have picked the wrong platform, *don't panic*.

Here are the steps we recommend:

1 Appraise your current platform

2 Evaluate other options

3 Visualize your new timeline

4 Take the steps to switch

Read on for more details on each of these steps.

**Want to learn more about BerniePortal?
Visit www.BerniePortal.com or
call us at 1-844-218-0909.**

STEP 1:

Appraise your current platform



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Your benefits administration platform should be measurably beneficial to your agency. There are a few signs in particular that indicate your platform isn't performing up to par.

Four signs your platform isn't performing:

1. Price outpacing value

Under a per-employee-per-month pricing format, you may see costs grow faster than value. A flat-fee arrangement can be better, especially if you have many groups or several fairly large ones.

2. Poor support

Was the platform's training effective? Did the vendor build out your caseload, and was the process efficient? Lastly, even the best technology has glitches. When these occur, how responsive is your software vendor? Do you have a dedicated point of contact? If you are consistently underwhelmed by your platform's support team, this is a big red flag.

3. Static software

How important is it to you that your platform be early to market with new features and compliance items? Benefits administration is an evolving industry and you want your software to keep up. Some examples include 1094-C/1095-C reporting, overtime regulations and a robust mobile experience. This is especially important to consider if you were an early adopter of technology—has your platform grown with the industry?

4. Clients not enrolling

If your clients aren't online after a reasonable roll-out time, this is a big sign you may need to switch platforms. Your vendor should have conducted effective training on how to bring clients online, even tech-limited groups. If your vendor isn't helping you get your clients online, you simply aren't reaping the return on your investment.

If your agency is experiencing these tech roadblocks, it may be time to consider a switch.

STEP 2: Evaluate Other Options



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Because you've already been through this process once, this step should be comparatively shorter than before. You will want to spend some time researching your options and compiling a list of vendors to compare. You may have a few that you evaluated the first time around, but there could be some you missed. We highly recommend asking other brokers for recommendations.

If you downloaded our e-book "[Buying Benefits Administration Software: The Buyer's Workbook](#)," you know how important it is to identify your priorities before speaking to vendors. In a circumstance where you are not buying for the first time, but switching platforms, this is even more crucial.

Your experience with your current platform should give you a clear vision of what you want and need from your software. Outline where you think your current software is falling short, and be sure to ask product specialists all of your questions during the demo process.

Whether it's a certain feature you absolutely need, robust customer support, or a better pricing platform, this time, you'll have the background knowledge to make an even more informed decision.



STEP 3:

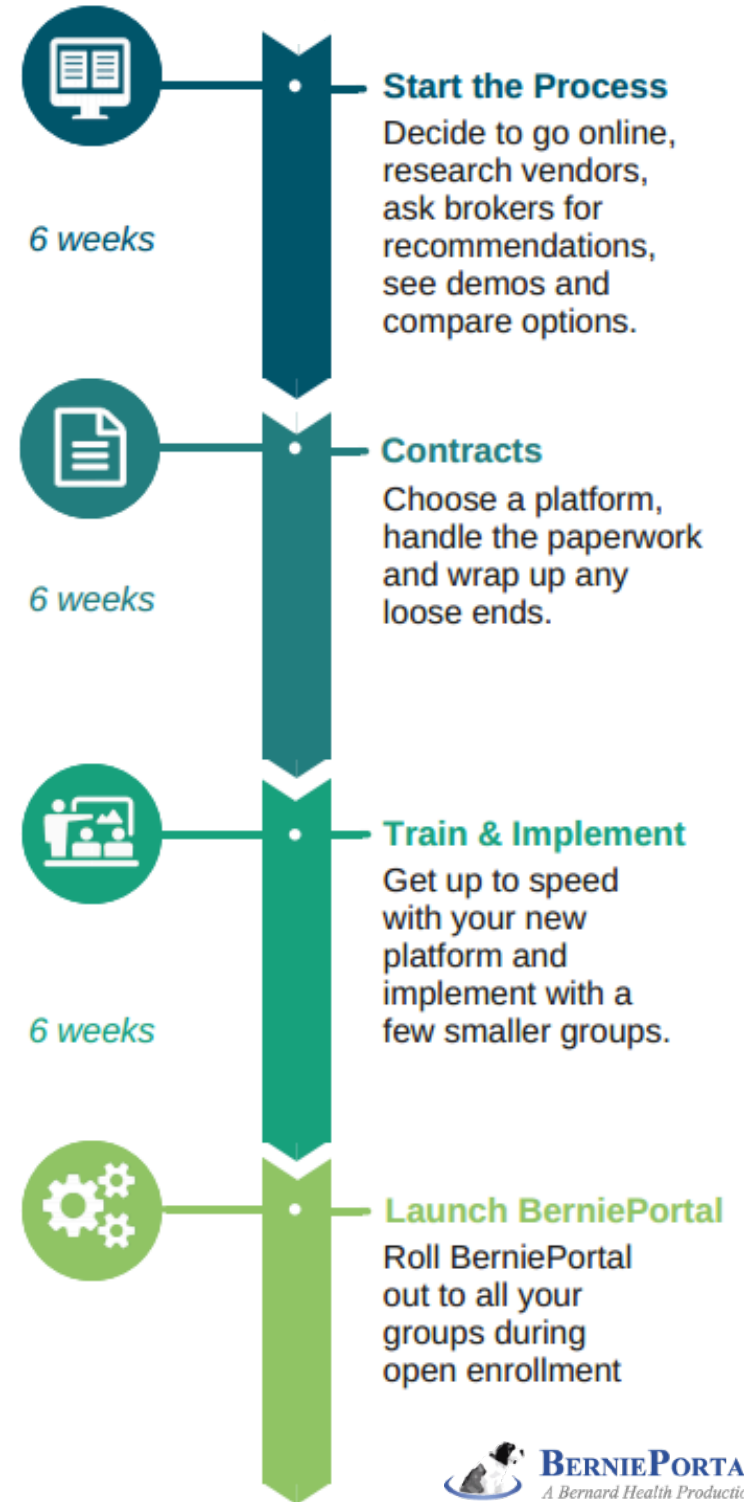
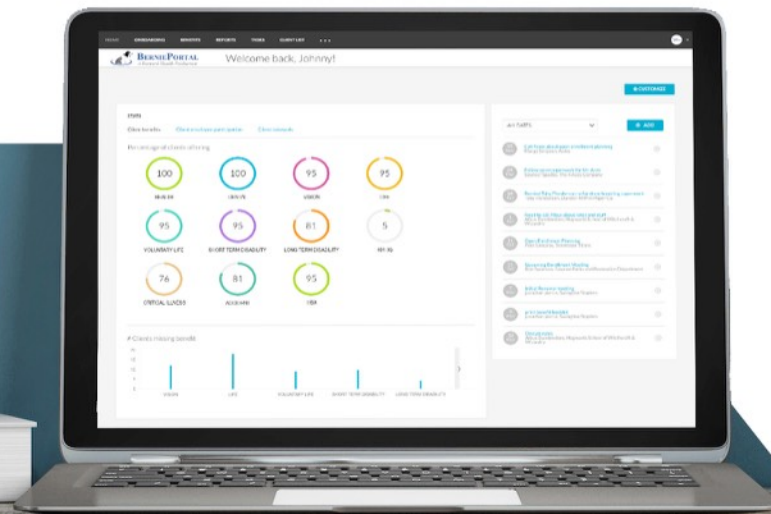
Visualize the new timeline



STEP 3: Visualize the new timeline

Again, if you've been through this process once, you know what to expect. We generally recommend allocating **up to 18 weeks for the entirety of the buying process**, though the evaluation process may be shorter the second time around.

However, you will also have to consider an additional block of time for ending your existing contract and disengaging with your current platform. You will need to get some information from your future vendor—which is the next step—to fully visualize your timeline, but you can sketch out a rough outline before doing so.



STEP 4:

Take the steps to switch



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Right now, making the best of your current situation may feel preferable to beginning again. But ultimately, if you want to maximize the benefits of going online and you've decided your current vendor isn't up to par, you will need to disconnect.

We recommend the following steps:

1. Make the decision

Once you have selected a new vendor, sign on and begin the contracting process. Don't delay, as you will want to begin transitioning as soon as possible to maximize value.

2. Begin transitioning from the old system to the new system

During demos, you will especially want to ask vendor prospects what this step will look like. With BerniePortal, our Client Success team handles all buildouts, whether you're new to software or switching. The first step is developing a transition plan with our team, prioritizing clients who need to be moved first and how many need to be moved total. Our team then pulls the information from your existing platform and loads it into BerniePortal.

3. Cancel with your current vendor

Once you and your groups are transitioned, cancel with the vendor from which you are changing. From an ideal cost standpoint, you would see one contract end and the next vendor's begin the following day, but that is generally not realistic. If the new vendor is desirable enough to change, the opportunity cost of not switching before your current contract is up is too high to wait.



Common Questions & Answers

Why do we recommend doing it this way?

If you tell the current vendor you're leaving before switching, you risk seeing your service level decrease immediately, and transitioning could become more difficult.

How long does this process generally take?

This will depend on how many clients you have with the current vendor. At BerniePortal, we've seen situations where the agency has zero clients on the current platform, and switching is a breeze. The more clients a broker has online, the longer it can take.

When is the best time to begin this process?

The best time to sign a contract with a new vendor is outside of the fourth quarter. Add some new clients to the system first and get comfortable with it, then switch the clients you have on the old platform to the new platform during open enrollment. This is the easiest time to make the switch for existing clients, as employees need to make elections and update their information already.

[Click here to download a timeline of the implementation process](#)

Conclusion

Now that you have all the information you need, it's time to move forward. No broker wants to choose the wrong benefits administration platform. But if that's the situation you find your agency in, don't panic. The move online isn't going anywhere, so don't feel like you have to settle for a product that isn't bringing measurable value to your organization.

BerniePortal was built by brokers for brokers, and it's our deep benefits industry knowledge and first-hand experience in benefits administration that makes us a valuable partner in agency success.

To schedule a demo or learn more about BerniePortal, call us at **1-844-218-0909** or visit www.BerniePortal.com.

