



Helping Brokers & Consultants Grow

How employers are making better buying decisions & finding the right partners

Will the webinar be recorded?



Yes!

We will send you a link to the recording after the webinar.

Will the slides be available?



Yes!

We will send you a link to the PDF
after the webinar.

How do I ask questions?



GoToWebinar Control Panel

- Screen Sharing
- Dashboard
- Attendees: 1 out of 1001
- Audio

Use: Telephone Mic & Speakers

Dial: +1 (415) 655-0059
Access Code: 732-878-437
Audio PIN: 77

If you're already on the call, press #77# now.
[Problem dialing in?](#)

Talking:

- Webcam
- Questions

Show Answered Questions

Question	Asker

Type answer here

- Polls
- Chat

Test - Witnessing History
Webinar ID# 154-586-243

GoToWebinar

Today's Speakers



Neil Mammele

Director, Digital Strategy



David Churchill

*Co-Founder, Advisor, SHRM Broker
Finder*



Agenda



1. The Benefits Landscape
2. 4 Marketing Tactics Brokers Should be Using
 - Tactic 1: Social Media*
 - Tactic 2: Search Marketing*
 - Tactic 3: Content Marketing*
 - Tactic 4: Partner Spotlight: SHRM Broker Finder***
3. How PlanSource Works with Brokers



The Current Benefits Landscape
Complex, Costly & Constantly Evolving

Effective Benefits Communication

800

Amount of enacted laws and regulations passed in 2015 & 2016.

ACA is always top of mind.





Benefits: A Significant Investment for Employers

Benefits cost employers **25-40% of employee salaries**, and yet 30% of employees don't perceive value in their benefits and nearly 50% don't understand them.

Sources: U.S. Bureau of Labor Statistics, The International Foundation of Employee Benefits Plans

Change is Impacting Employers


Technology is changing the way that benefits are bought, sold and managed



Employers

are concerned with the rising cost of healthcare while minimizing the cost of benefits administration and compliance.

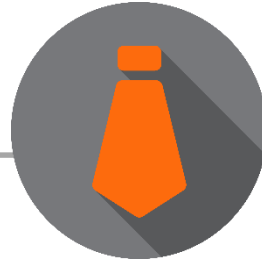
With benefits being the largest component of labor costs outside of wages, workflow automation is critical.

A man in a white shirt and green tie is covering his face with his hands, suggesting stress or frustration. The background is a blurred office environment with warm lighting. A semi-transparent grey box is overlaid on the image, containing text.

Employees
are not prepared
to be consumers
of healthcare

What Does that Mean for You?

Technology is changing the way that benefits are bought, sold and managed



Brokers / Consultants

are being challenged to provide benefits admin technology alongside their traditional benefits offerings.

Brokers are bringing best-in-class benefits solutions to their clients, and will eventually bring HCM solutions to their clients.

The Need for Benefits Experts

60%

Higher search traffic in 2018 on google for “benefits experts” & “employee benefits help.”



4 Marketing Tactics Brokers Should Be Using



1) Social Media

Time Spent Selecting Benefits

83%

of employees spend less than an hour researching their open enrollment options.

Why Social Media

Be strategic about what you say and when you say it

Social media users spend a great deal of time on their favorite
social media channels –
109 minutes per day

Source: Social Media & Marketing Daily

Why Social Media

Be strategic about what you say and when you say it

Social media drives action, online and offline. People make purchases after learning about a product or service through the platform

Source: Social Media & Marketing Daily

Social Media – Free Tools

Start a group!



PlanSource - 2018 Open Enrollment

Closed Group

About

Discussion

Members

Events

Manage Group

Search this group

Shortcuts

Revelry's Unofficial Brid...

Run It Softball 6

PlanSource 7

Barstool Sports Pod... 18

Charleston SC adult... 2

Joined Notifications Share More

Write Post Add Photo/Video Live Video More

Write something...

Photo/Video Poll Feeling/Activ... More

Neil Michael shared a link. 2 mins

Hi All! With all the ACA news this week I figured it was timely to refresh on what the 1095-C is all about. Let me know if you have any questions!



What is the Form 1095-C? - Understanding Benefits | PlanSource Videos

All full-time employees at companies with more than 50 full-time employees will receive a Form 1095-C to report health care coverage offered by employers. Learn... PLANSOURCE.COM

Like Comment

Write a comment...

Neil Michael created a poll. 7 mins

Which voluntary benefit would you like to know more about to help your decision to opt in?

- Pet Coverage
- ID Theft Protection
- Financial Counseling
- Legal Services
- + Add option

Like Comment

ADD MEMBERS

Enter name or email address

MEMBERS



SUGGESTED MEMBERS

Friends

Mallory Christine

Erin Mammelle

Robi Duncan

See More

DESCRIPTION

Tell people what this group is about

TAGS

Add a few descriptive keywords

LOCATIONS

Add Location



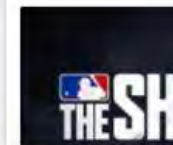
CREATE NEW GROUPS

Groups make it easier to share with friends, family and teammates.

Suggested Groups



Ozzy Man's Video Subn 19,610 members



MLB 18 The SHOW PS4 14,340 members

Paid Alternative: Advertising with Facebook

Getting Specific With Your Audience

Just need a Facebook page

Target audiences that are similar to your customers

Re-Target visitors from specific pages

Let the Data guide your decisions

Target based on interests, Job Title, Pages they like, and more

The screenshot shows the Facebook 'NEW AUDIENCE' creation interface. On the left, several colored arrows point to specific targeting options: a blue arrow to 'Custom Audiences', a green arrow to 'Locations', a purple arrow to 'Age', an orange arrow to 'Gender', a red arrow to 'Languages', and a pink arrow to 'Detailed Targeting'. The main form includes fields for 'Custom Audiences', 'Locations' (set to 'Everyone in this location'), 'United States' (with a location pin), 'Age' (18-65+), 'Gender' (All, Men, Women), and 'Languages'. The 'Detailed Targeting' section is set to 'INCLUDE people who match at least ONE of the following'. On the right, the 'Audience Definition' panel shows a gauge indicating 'Your audience selection is fairly broad' and 'Audience Details' for 'United States' and '18-65+' with a 'Potential Reach: 190,000,000 people'.

Specific Targeting

AUDIENCE DETAILS

Location - Living In: United States

Excluded Connections: Exclude people who like PlanSource

Age: 26 - 60

People Who Match: Interests: Human resource management, Health insurance coverage in the United States, Insurance broker or Health insurance, Field of study: Human resource management, Job title: Chief executive officer, Senior HR Advisor, Human resource management, Certified Public Accountant, HR & Administration Manager, Human Resource Officer, Chief human resources officer, High Representative of the Union for Foreign Affairs and Security Policy, Benefits Specialist, HR Supervisor, Director of HR, Human Resources Officer (HR Officer), Human Resources Coordinator, Human Resource Director, Benefits Consultant, Benefits Analyst, Human Resource Specialist, Benefits Administrator, Benefits Manager, Director of Human Resources, Human Resources Generalist, Human Resources Director (HR Director), Head of Human Resources, Human Resources Specialist (HR Specialist), Human Resources Manager (HR Manager), Human Resources Generalist (HR Generalist), Human Resources Supervisor, Benefits Coordinator, Human Resources Administrator or Human Resources Vice President

[Edit](#)

Potential Reach of 5.3m

LinkedIn

Target by Titles, Company, and more

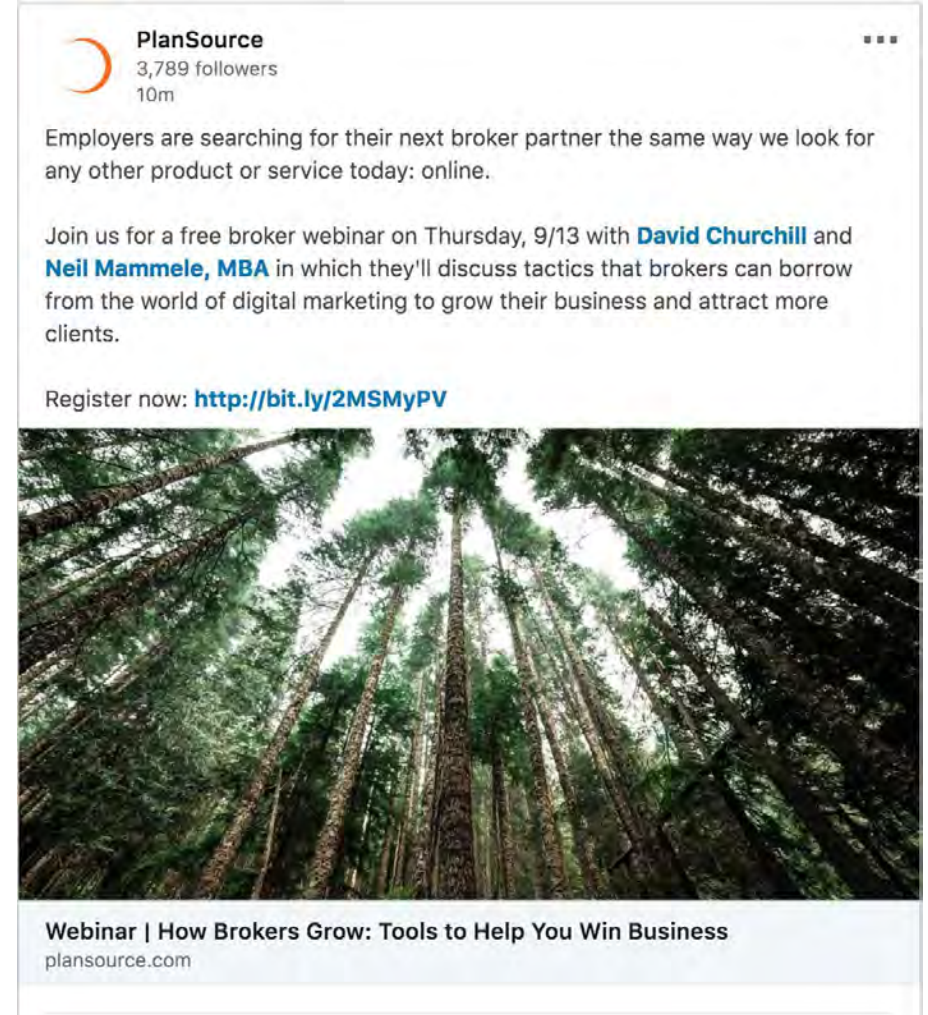
4 out of 5 LinkedIn members drive business decisions

Website Retargeting: Re-engage your website visitors

Contact Targeting: Upload email list from a trade shows

Account Targeting: Market based on company names

Source: *Salesforce Advertising Index Report 2016*



The image shows a LinkedIn post from the company PlanSource. The post header includes the PlanSource logo, the company name, 3,789 followers, and a post time of 10m. The main text of the post discusses how employers search for broker partners online and promotes a free webinar on Thursday, 9/13, featuring David Churchill and Neil Mammele, MBA. A registration link is provided: <http://bit.ly/2MSMyPV>. Below the text is a photograph of a dense forest of tall, thin trees. At the bottom of the post, there is a light blue banner with the text: "Webinar | How Brokers Grow: Tools to Help You Win Business" and the website "plansource.com".

PlanSource
3,789 followers
10m

Employers are searching for their next broker partner the same way we look for any other product or service today: online.


Join us for a free broker webinar on Thursday, 9/13 with **David Churchill** and **Neil Mammele, MBA** in which they'll discuss tactics that brokers can borrow from the world of digital marketing to grow their business and attract more clients.

Register now: <http://bit.ly/2MSMyPV>

Webinar | How Brokers Grow: Tools to Help You Win Business
plansource.com















LinkedIn

Target by Titles, Company, etc.

 What location do you want to target? (required)

include ▾ Start typing a country, state, city, or town... [See full list](#)

Select specific targeting criteria to zero in on your ideal audience:

Company name 	Company industry 	Company size 	Job title 	Job function 
Job seniority 	Member schools 	Fields of study 	Degrees 	Member skills 
Member groups 	Member gender 	Member age 	Years of experience 	

Putting Social Media to Practice



Where is Your Audience?– Research your market before picking outlets

Start the week right with LinkedIn – “This Week at PlanSource” posts go out each Monday promoting webinars, videos, and events happening that week.

Curate Content – Use a tactic like “Flipboard”

Download our [Dos and Don'ts of Social Media](#)

...just try it!

More on Flipboard

Setting up your personal newspaper

A personal magazine, tailored based on your interests

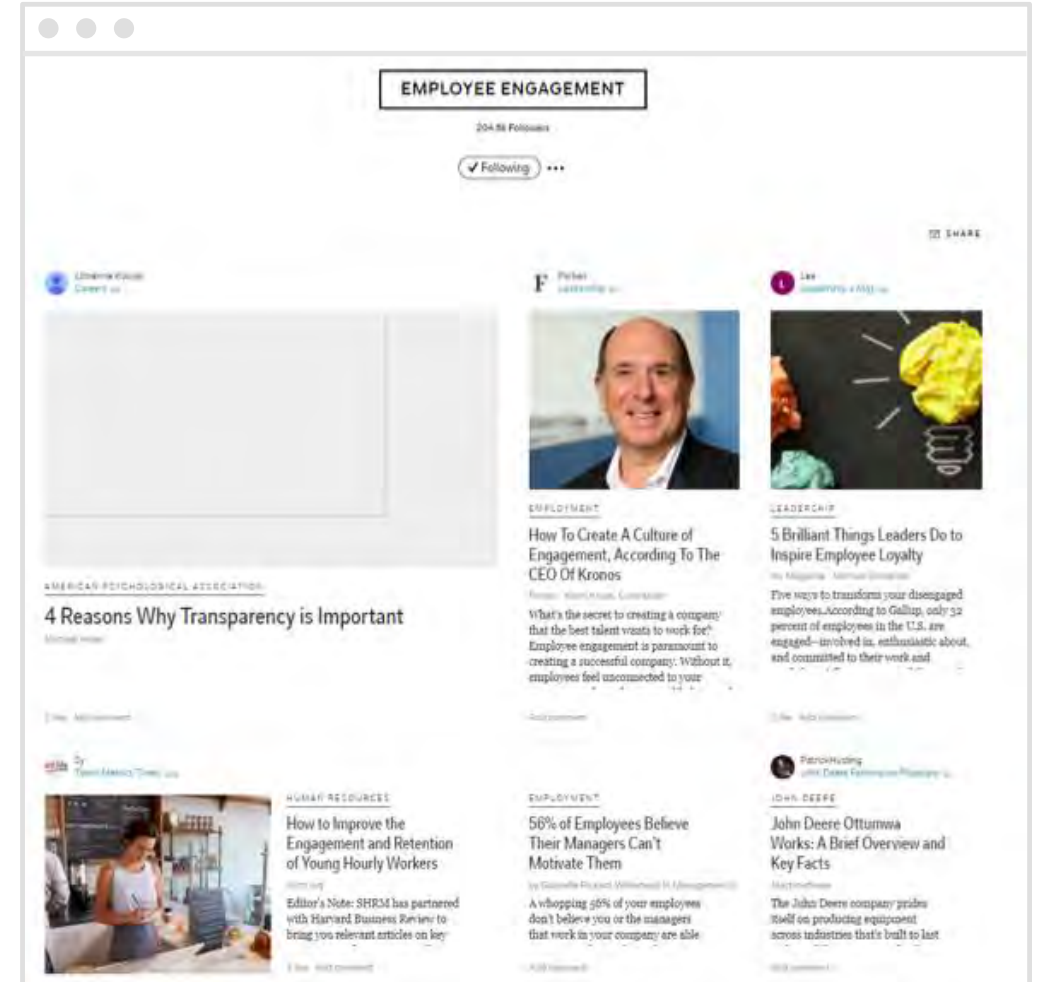
Updated daily, from sources like: Forbes, Inc, SHRM, etc.

Channels to Follow:

Employee Engagement

Human Resources

Benefits Enrollment





2) Search Marketing

Effective Benefits Communication

88%

The percent of consumers researching their buys online before making a purchase.

Search Marketing

See it in Action

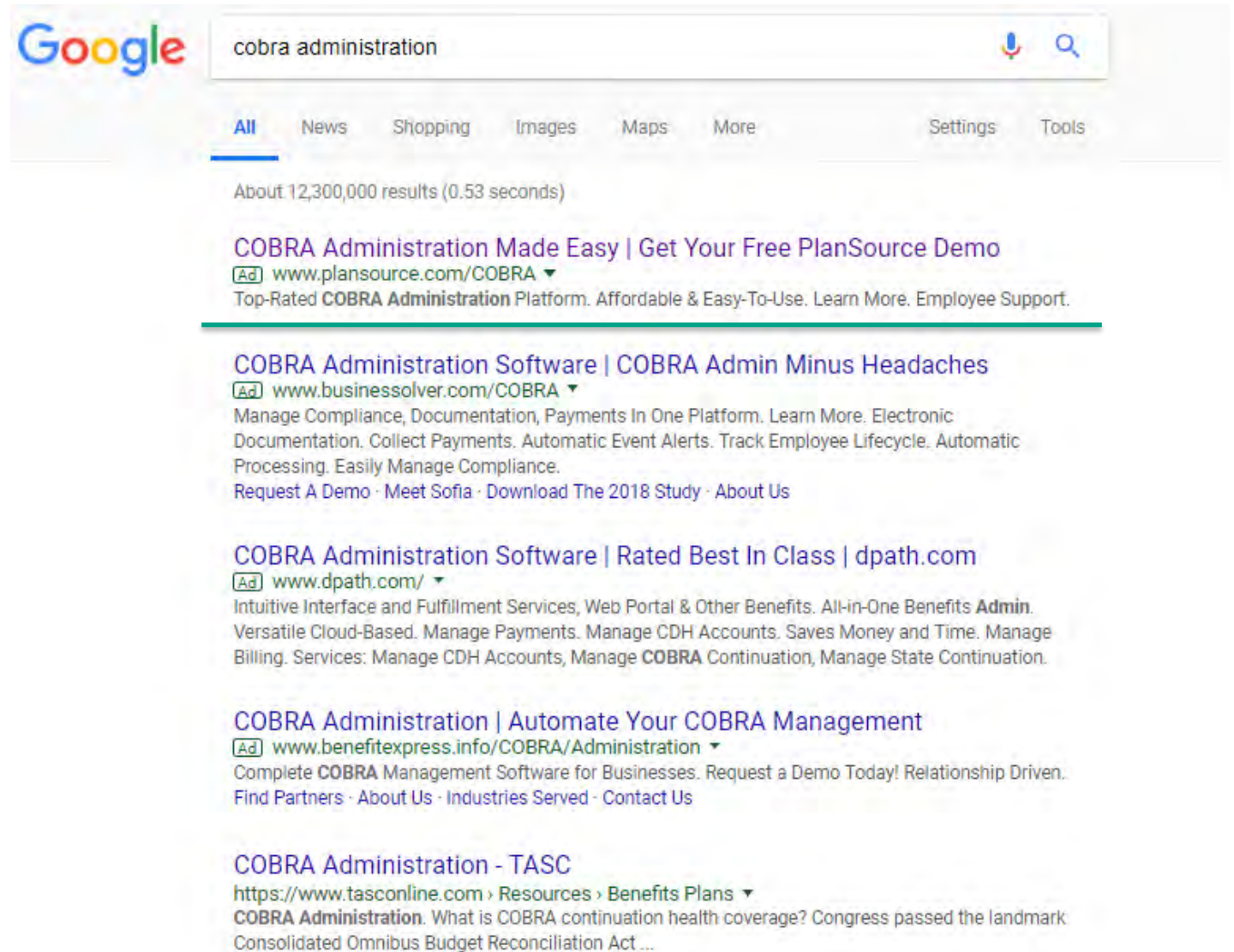
Look into Google AdWords

No minimum budget

Only pay when somebody clicks on your ad

Specify the specific terms you want to bid on

Target based on location, interests, time of day and more



The screenshot shows a Google search for "cobra administration". The search bar contains the text "cobra administration" and the Google logo is on the left. Below the search bar, there are tabs for "All", "News", "Shopping", "Images", "Maps", "More", "Settings", and "Tools". The search results show "About 12,300,000 results (0.53 seconds)".

The first result is a paid search advertisement for "COBRA Administration Made Easy | Get Your Free PlanSource Demo" from www.plansource.com/COBRA. The description reads: "Top-Rated COBRA Administration Platform. Affordable & Easy-To-Use. Learn More. Employee Support."

The second result is a paid search advertisement for "COBRA Administration Software | COBRA Admin Minus Headaches" from www.businessolver.com/COBRA. The description reads: "Manage Compliance, Documentation, Payments In One Platform. Learn More. Electronic Documentation. Collect Payments. Automatic Event Alerts. Track Employee Lifecycle. Automatic Processing. Easily Manage Compliance. Request A Demo · Meet Sofia · Download The 2018 Study · About Us"

The third result is a paid search advertisement for "COBRA Administration Software | Rated Best In Class | dpath.com" from www.dpath.com/. The description reads: "Intuitive Interface and Fulfillment Services, Web Portal & Other Benefits. All-in-One Benefits Admin. Versatile Cloud-Based. Manage Payments. Manage CDH Accounts. Saves Money and Time. Manage Billing. Services: Manage CDH Accounts, Manage COBRA Continuation, Manage State Continuation."

The fourth result is a paid search advertisement for "COBRA Administration | Automate Your COBRA Management" from www.benefitexpress.info/COBRA/Administration. The description reads: "Complete COBRA Management Software for Businesses. Request a Demo Today! Relationship Driven. Find Partners · About Us · Industries Served · Contact Us"

The fifth result is a search result for "COBRA Administration - TASC" from <https://www.tasconline.com>. The description reads: "COBRA Administration. What is COBRA continuation health coverage? Congress passed the landmark Consolidated Omnibus Budget Reconciliation Act ..."

Search Marketing

See it in Action

The screenshot shows the PlanSource website landing page for COBRA Administration. The page features a header with the PlanSource logo, navigation links for 'Get In Touch', 'See a Demo', and 'Log In', and a hamburger menu icon. The main content area has a background image of stacked stones and a teal-bordered box containing the text 'COBRA Administration' and 'Stay compliant', with a 'See the Brochure' button. Below this is a navigation bar with links for 'Employee Contact Center', 'Billing Reconciliation and Payment', 'Benefit Account Administration', 'Dependent Verification', 'COBRA Administration' (highlighted), 'Employee Communications', and 'Benefits Outsourcing'. The main body contains two columns of text under the headings 'What is the Service?' and 'How Does The Service Work?'. The 'What is the Service?' section explains that COBRA is managed and delivered by PlanSource, providing a full picture of who is in the benefit plan and who is subject to COBRA requirements. The 'How Does The Service Work?' section states that PlanSource will handle the full cycle of COBRA administrative responsibilities, including generating and communicating initial and qualifying events notices, auditing participants for accuracy, and assuming full premium collection, monthly remittance, and issue resolution with the carriers on the employer's behalf. At the bottom, there is a section titled 'What Are The Benefits of the Service?'.

PLANSOURCE

Get In Touch See a Demo Log In

COBRA Administration

Stay compliant

See the Brochure

Employee Contact Center Billing Reconciliation and Payment Benefit Account Administration
Dependent Verification **COBRA Administration** Employee Communications Benefits Outsourcing

What is the Service?

Even though COBRA can be treated as a commodity, how it is managed and delivered by PlanSource is anything but. We're providing you a full picture of who is in the benefit plan and who is subject to COBRA requirements. Since we are managing the end-to-end offering including initial and qualifying event notices, data exchange with carriers and participant auditing, PlanSource assumes liability and indemnifies employers who use this service.

How Does The Service Work?

PlanSource will handle the full cycle of COBRA administrative responsibilities. This starts with generating and communicating initial and qualifying events notices so you don't have to worry about staying compliant or being subject to penalties. We will audit participants for accuracy using employee data from the PlanSource Benefits Administration System, and assume full premium collection, monthly remittance and issue resolution with the carriers on your behalf.

What Are The Benefits of the Service?

Relevant user experience from keyword to ad copy to landing page.

Putting Search Marketing to Practice



Mobile - Ready - Users can see your ad and call your number directly

Geo - Specific - You can target areas down to a .5 mile radius

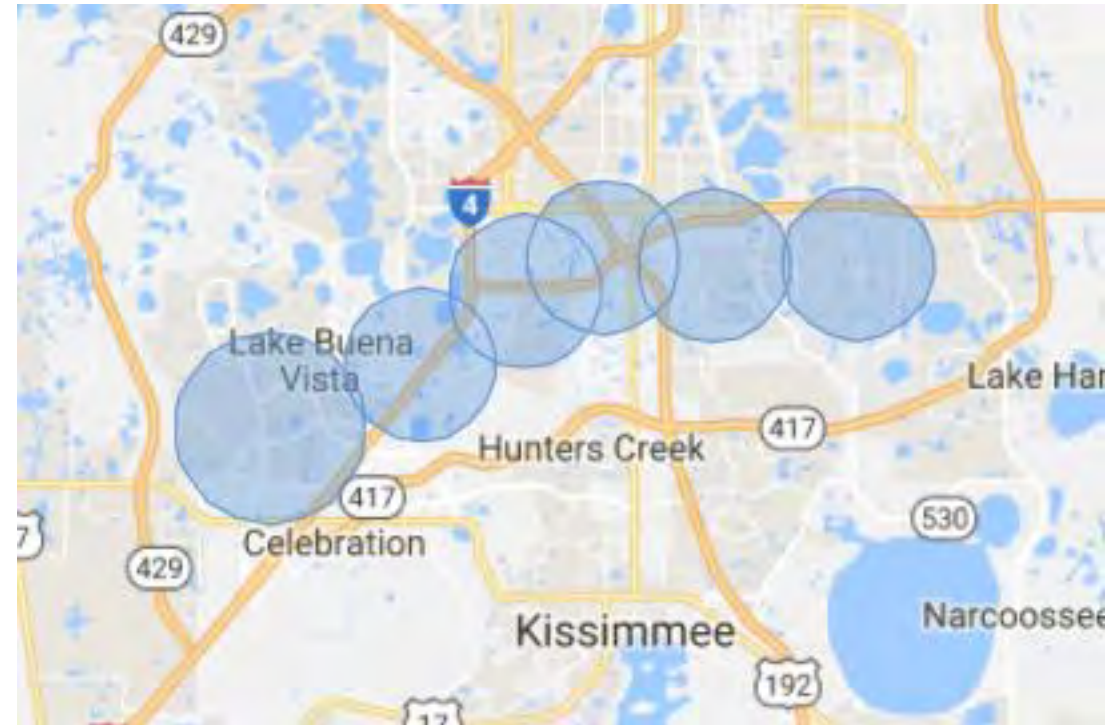
Pay per Click - You only pay when somebody clicks on your ad and goes to your landing page

Service - Specific Creative - Users searching “COBRA” will see a different ad than “Open Enrollment Call Centers”

More on Geo - Fencing

About Geo-Fencing

- Geo – Based targeting on mobile phone (desktop optional)
 - Drop a pin on a location and create a radius as small as .1 mile around it
- Use Cases
 - Enhance traditional marketing: Billboards, Events, etc
 - Target Office Locations





3) Content Marketing

CONTENT is KING



Content Marketing

96%

Percent of B2B buyers that want content with more input from industry thought leaders

Content Marketing

3 to 5

Pieces of content a buyer will consume before engaging a sales rep

Two Types of Content

#1 Downloadable Content

Infographics

Guides

Whitepapers

eBooks

#2 Thought leadership

Blogs/Guest Blogging

Webinars

Videos

Putting Content Marketing to Practice



What is Your Voice? - Get real with yourself and your company before creating content

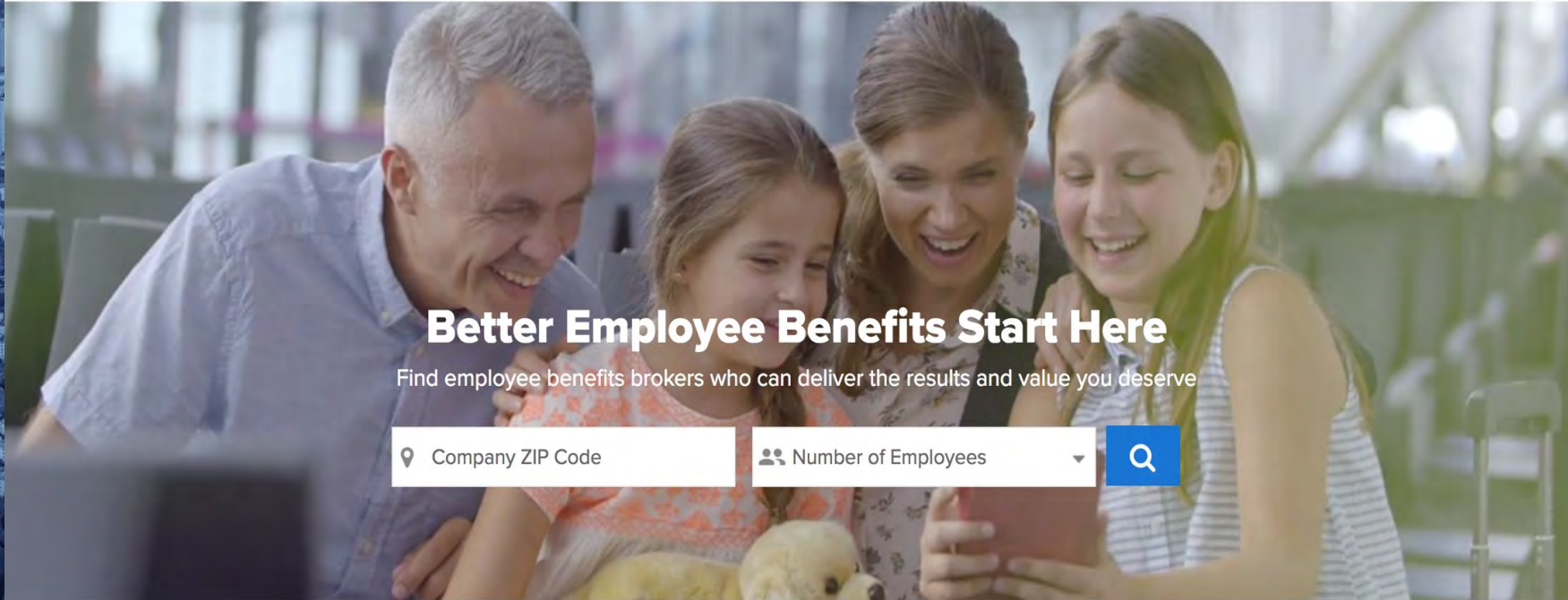
Set Up Your Content Calendar - You can download templates on sites like [CoSchedule](#)

Use Your Partners - Do they take guest blogs? Would they like to write a blog for you?

Create Once, Publish Everywhere - One talk at an event can turn into a: webinar, blog, video, etc.



4) SHRM Broker Finder



Better Employee Benefits Start Here

Find employee benefits brokers who can deliver the results and value you deserve

Everything You Need To Make An Exceptional Broker Hire

ONLINE MATCHMAKING

Angie's list.

realtor.com®

KAYAK®

FINRA

FARMERSONLY.COM

CITY FOLKS JUST DON'T GET IT.

broker spotlight
by eVest Benefits

EFFICIENTLY CONNECTING THE MARKETPLACE



Why is the SHRM partnership such a big deal?

BY THE NUMBERS⁺

1.8 MILLION+
active users

2.9 MILLION+
sessions

7.4 MILLION+
page views

65%
of site visitors return
at least weekly*

8 OUT OF 10 VIEWERS

VISIT SHRM.ORG EXCLUSIVELY FOR NEWS AND INFORMATION
ABOUT HR.***



SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

SHRM Broker Finder

Powered by Elevate Benefits

Why is the SHRM partnership such a big deal? (cont.)

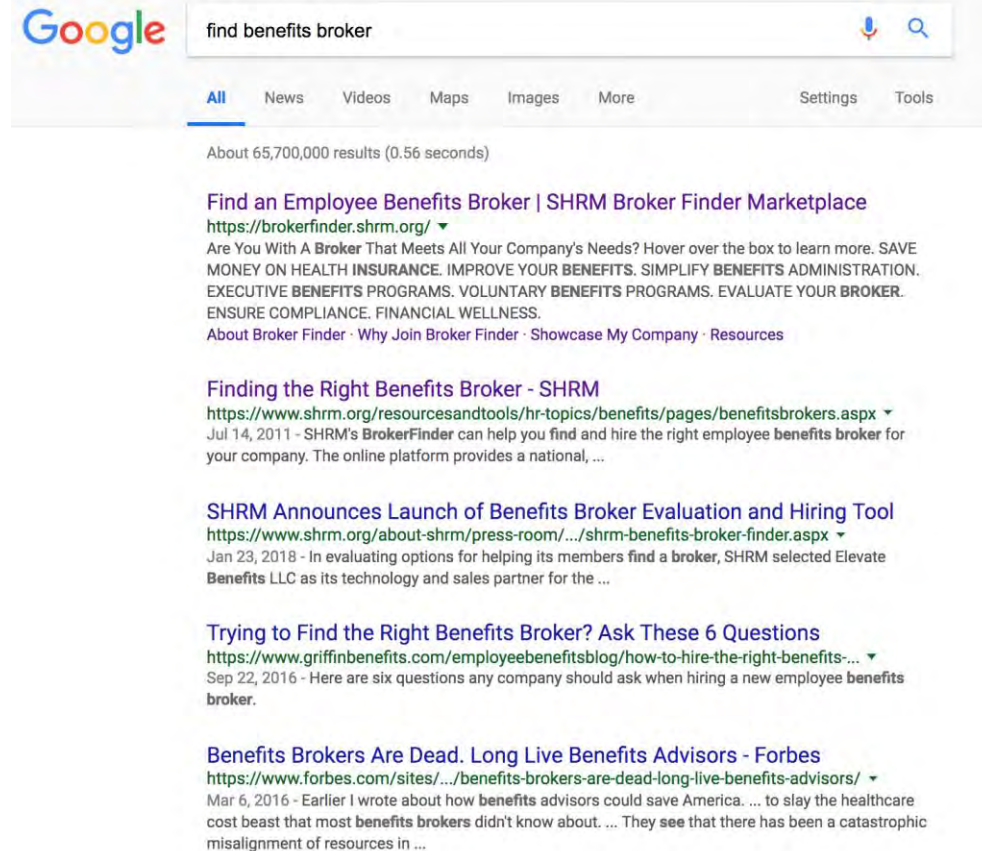
- **423,000 subscribers to HR Daily**
- **Active user population up 16% year over year**
- **15,000+ attendees to SHRM annual conference**
- **159,000 attendees on 2016 SHRM webcasts**



SHRM Broker Finder

Powered by Elevate Benefits

Searching for a broker online



Google find benefits broker

All News Videos Maps Images More Settings Tools

About 65,700,000 results (0.56 seconds)

Find an Employee Benefits Broker | SHRM Broker Finder Marketplace
<https://brokerfinder.shrm.org/> ▼
Are You With A Broker That Meets All Your Company's Needs? Hover over the box to learn more. SAVE MONEY ON HEALTH INSURANCE. IMPROVE YOUR BENEFITS. SIMPLIFY BENEFITS ADMINISTRATION. EXECUTIVE BENEFITS PROGRAMS. VOLUNTARY BENEFITS PROGRAMS. EVALUATE YOUR BROKER. ENSURE COMPLIANCE. FINANCIAL WELLNESS.
[About Broker Finder](#) · [Why Join Broker Finder](#) · [Showcase My Company](#) · [Resources](#)

Finding the Right Benefits Broker - SHRM
<https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/benefitsbrokers.aspx> ▼
Jul 14, 2011 - SHRM's BrokerFinder can help you find and hire the right employee benefits broker for your company. The online platform provides a national, ...

SHRM Announces Launch of Benefits Broker Evaluation and Hiring Tool
<https://www.shrm.org/about-shrm/press-room/.../shrm-benefits-broker-finder.aspx> ▼
Jan 23, 2018 - In evaluating options for helping its members find a broker, SHRM selected Elevate Benefits LLC as its technology and sales partner for the ...

Trying to Find the Right Benefits Broker? Ask These 6 Questions
<https://www.griffinbenefits.com/employeebenefitsblog/how-to-hire-the-right-benefits-...> ▼
Sep 22, 2016 - Here are six questions any company should ask when hiring a new employee benefits broker.

Benefits Brokers Are Dead. Long Live Benefits Advisors - Forbes
<https://www.forbes.com/sites/.../benefits-brokers-are-dead-long-live-benefits-advisors/> ▼
Mar 6, 2016 - Earlier I wrote about how benefits advisors could save America. ... to slay the healthcare cost beast that most benefits brokers didn't know about. ... They see that there has been a catastrophic misalignment of resources in ...



SHRM Broker Finder
Powered by Elevate Benefits

EFFICIENTLY CONNECTING THE MARKETPLACE



SHRM
SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

SHRM Broker Finder
Powered by Elevate Benefits



How PlanSource Works With Brokers

A Partner-Driven Approach

Flexible partnership models

	OutSource	CoSource	Reseller
Branding	☾	PlanSource or Powered by PlanSource	Partner
Customer Relationship Management	Partner	Partner	Partner
Setup and Implementation	☾	Partner	Partner
Ongoing Support	☾	Partner	Partner
Data Exchange with 3rd Parties	☾	☾ OR Partner	☾ OR Partner

A Partner-Driven Model

Leading companies rely on PlanSource





Why Partners Choose PlanSource

A partner-friendly technology platform and model that can support the needs of your entire book of business

Proven to increase win rates, employee participation and client retention

Incentives from insurance carriers make it affordable

Expanded value proposition with a benefits-centered HCM suite



More on SHRM Broker Finder
dchurchill@elevatebenefits.com

20% Discount Code: PLANSOURCEVIP20



Q&A



Continue the Conversation

877-735-0468

plansource.com/contact-us

@PlanSource