

NAIFA Partners With Agency-Management System

NAIFA has partnered with BASIC Guru, an inexpensive and easy-to-use agency-management system that appeals not only to agents and brokers, but to employers and employees as well.

According to Bret Spinks, vice president of marketing for BASIC Guru, the product allows an agency to distinguish itself in today's highly competitive marketplace without having to make a huge investment.

"To me, the major attraction is that it is a great prospecting tool for agents and brokers," Spinks says. "They can approach employers with enthusiasm because BASIC Guru will let them share full benefit information from all of their carriers in one place."

One of the more popular tools in Guru lets employers show their employees their total compensation statements, which they can access 24/7. "And the human resources people love it," Spinks says. "Accessing benefits online is the direction everyone in the field is going. It is not a question of if, but when, a company will start it. Moreover, BASIC Guru does not require a huge investment. The monthly fee for five or fewer users in an agency is \$195 as a flat fee for NAIFA members, and the program can be implemented quickly. Further, BASIC Guru offers users a 10 percent discount for COBRA, HRA, HSA and FSA administration, as well as for POP plans for a flat fee of \$95."

Attraction for agents

Spinks says that agents can use BASIC Guru as a tool to manage their clients, prospects, carriers, net-

works, commission tracking, census and continuing education. "As an agency, you can access all your records, store carrier benefit plans, track the agency book of business and create reports for summary of benefits and commission summary by product or employer," he adds.

Agents can also save time with a tool that enables them to create a census they can email or fax to insurance carriers for quick quotes. Another tool greatly accelerates the importing of group data, and the product provides extras, such as a template for creating an employee manual.

"With this feature, the employer and the employees make changes to suit their needs," Spinks says. "For example, they can insert a policy for sick days and holidays. They can make all kinds of similar customized changes, and then have their lawyer review it before loading it into BASIC Guru so that the employer and their employees can access it at anytime."

"This can save a business thousands of dollars because it does not have to create or pay for the manual from scratch. We also have a high-quality, monthly PDF newsletter that agents can send to clients and prospects with different articles aimed at small to mid-size businesses."

Agents who use BASIC Guru have an edge over their competitors, because their business clients can view all their benefit options, current rates, and expiration dates. They can also upload or download important forms and documents, as well as create "The Hidden Pay-

check," which details how much an employee's benefits are truly worth.

Other features popular with employers are online tools they can use to stay compliant with complex HR issues, find summaries of benefits, network options and plan costs. They can also use BASIC Guru to store HR forms and documents they would like to share with employees.

For more information, go to www.guru.basiconline.com or call 888-624-4878. □

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calendar of events

LAMP 2011

Washington, D.C.
March 20-23, 2011
Call 800-345-2687;
visit www.gamaweb.com

MDRT Annual Meeting

Atlanta
June 5-8, 2011
Call 847-692-6378;
visit www.mdrt.org

NAIFA 2011 Career Conference and Annual Meeting

Washington, D.C.
Sept. 10-14, 2011
Call 800-866-2432;
visit www.naifa.org