



“Would you invest \$210.00 per month to earn two or three times that amount by selling one additional group?”

Key Features & Benefits

Agency Management

- *Branch administration – add in all branches*
- *Agent administration – ability to add agents by branch location*

Commission Tracker

This enables the agency to setup, track and split commission and fees for all agents and sub agents. This system can handle an unlimited number of commissions and fee splits. As commissions are entered into mybasicGURU, the system automatically splits the commission for reporting. Tracking reports can be viewed at the agency level (all agents) or at the agent level.

Lead Management

This enables the agency to setup leads, sort the leads by renewal dates, and store notes of conversations throughout the year with a prospect. Send out census forms to prospects with ease. One touch conversion from a prospect to a client with all notes transferring automatically into the employer notes section.

Carrier Management

- *Carrier administration allows you to select carriers that your agency works with as well as create an agency contact database. You can add additional carriers to your database at any time. Benefit plans are submitted to the administrator for uploading to system once the agency/agent has verified all information.*
- *Create carrier notes and track your communication with each carrier*

Continuing Education (CE) Management

- *Keep track of agent continuing education requirements*
- *Create CE completion reminders for each agent*
- *Track completed classes*
- *System identifies remaining hours to meet state requirements*
- *Print and e-mail reports when needed*

Reports

- *Summary of benefits for all lines of coverage by employer group for easy viewing*
- *Client/Prospect renewal report*
- *Employee election report*
- *Commission summary by product*
- *Commission summary by employer*
- *Service fee summary report*
- *Continuing education credits report*

Agency/Agent Tools

- Group Management is used to upload all group information via Excel into your mybasicGURU secured site
- Employee Management is used to upload all employee data via Excel into your mybasicGURU secured site
- Communicate with HR at your clients or prospects, with the carriers you work with and with the mybasicGURU administrator
- Personal Calendar with reminder settings
- My Resources allows the agency or agent to pre-load sites that are important to a group
- Ticker allows the agency or agent to run a ticker across the bottom of the screen with important information directed to the agent, or the HR administrator. The HR administrator can create a ticker for company employees
- My profile allows the agency or agent to update their information as well as upload their license numbers (by agency and agent), and set up continuing education reminders as well commission reminders
- Password agency or agent can change password at their discretion

Benefits Management

The tool provides your agency a competitive edge when you are trying to become agent of record. The tool also helps retain your existing Groups by enabling them to manage their employee benefits and perform critical HR functions such as:

- Summary of all benefits that each employee has selected, viewable to them only via user name and password.
- Create census for RFP to your carriers (**new 5/25/06**)
- Create customized Employee Benefit Statements (**new 4/106**)
- Review premium amounts by benefit plan
- Network options
- Personal calendars for each employer
- Internal communication between the employee and human resources
- Submit personal profile changes directly to human resources
- Access to important forms for the group

HRAnswerlink

These tools provide your clients' HR manager with many unique tools, such as:

- Newsletters/articles
- HR Checklist
- Ask the Pro, Question of the month
- 5 key HR success activities
- Useful HR compliance links

Employee Resources

- Employees have access to your site by user name and password. Employees can quickly review a summary of their benefits as well as their company summary plan description by line of coverage for more detailed information.
- Employees can view their network choice and check on provider status.
- Employees can review brochures of other insurance coverage as well as download important forms from the carriers that their employer works with.
- The employee can communicate with HR as well as submit changes to HR.

Why should you choose mybasicGURU?

Our service offers many of the same features as our competitors, but at a substantially lower cost!

Training and set up: \$395

**Monthly fees \$225 per month for 1 - 5 users (agents or CSR's)
\$250 per month for 6 – 10 users (agents or CSR's)**

As a NAHU member we offer a \$15.00 per month discount off the rates shown above.

***Data migration from another online tool is not included in our costs. This cost includes 500 MB of data storage; each additional 100 MB is an additional \$9.99 per month.**

ROI Example

The return on your investment can be dramatic. An average sale, which generates \$650 in monthly commission X 5 new clients, would generate \$3,000 in additional monthly income. Your return on your investment for this example would be 13:1.

We look forward to serving your needs in the near future. If you have questions please contact Bret Spinks at 800/444-1922 # 451.

We offer weekly webinar's where we go over all 4 levels of use in basicGURU in about 30 minutes. To register for one of our webinars please go to www.mybasicguru.com.