



Toolkit Overview

March 2010

Step-By-Step Guidance
A comprehensive system for success.



What is SMART?



- SMART is an online toolkit – a practice enabler for benefits advisors – for building, implementing, and managing Benefits Strategic Plans
 - Launched in April, 2009 after nearly 18 months of development, SMART is the only toolkit available in the marketplace today that focuses on the benefits strategic planning process
 - Developed by benefits industry veterans, SMART is a comprehensive, mission-critical toolkit that every benefits advisor should use
 - With dozens of users nationwide, SMART is a proven and easy-to-use product
 - It is accessed through the website www.smartadvisors.biz

What is benefits strategic planning?

1. The formal consideration of an organizations future course as it relates to human capital management and benefit programs
2. The process of aligning human capital management issues and corporate strategic direction to enable more effective benefits decision making

And, it is one of the top 3 priorities of organizations today

(Deloitte 2010 Top Five Total Rewards Survey)

Why Do I Need SMART?



- Employee benefits advising has become increasingly complex and competitive. Strengthening and protecting client relationships is the number one priority of most benefits advisors. With SMART, benefits advisors get there faster and ensure they stay ahead of their competitors.
- With SMART you will:
 - Elevate your client interaction to that of a trusted business advisor
 - Establish increased credibility with your clients
 - Distinguish your firm from competitors
 - Sell more products to existing clients
 - Retain client relationships longer

Product Overview



- **SMART Prospective Client Toolkit.** Our proprietary work plan for integrating benefits strategic planning as a practice differentiator.
- **SMART Existing Client Toolkit.** Our six-step, proprietary work plan for creating a benefits strategic plan.
- **User Forum.** Exclusive online SMART user discussion forum.
- **Voluntary Benefits Suite.** Six tools that provide education, case assessment and implementation guidelines.
- **SMART Tools.** With over 20 unique tools, SMART offers everything a benefits advisor will need to get the job done right, including:
 - Strategic Consulting Training
 - Client Surveys
 - Scripts
 - Meeting Agendas
 - Legal Document Templates
 - 40+ Question Fact Finder
 - PowerPoint presentations
 - Document Samples and Templates
 - Analytical Tools
 - Sample Strategic Plan

Product Overview

Existing Client Toolkit
Step 4: Synthesizing and Drafting

Call today! 410-585-6570

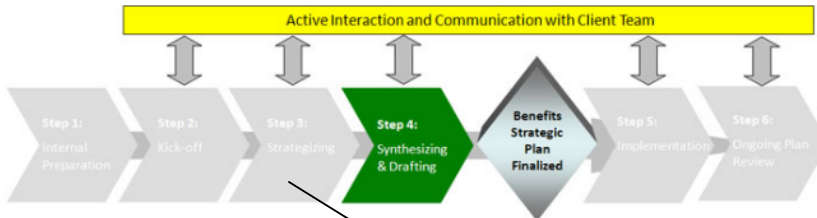
Existing Client Toolkit » Step 4: Synthesizing and Drafting

Step 4: Synthesizing and Drafting

Purpose Statement
The Synthesizing and Drafting step is where the Benefits Advisor gathers everything learned during the strategizing process and assembles one cohesive document to articulate the findings. For the Benefits Advisor, it is your opportunity to illustrate what you have learned and begin to map NEW benefit solutions for your client

SMART Roadmap

SMART Strategic Benefits Planning Roadmap
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Team Involved
Generally, Step 4 will involve only the internal team. However at certain points there may be client resources involved if any data points require clarification. At the conclusion of this phase the client team will receive the final deliverable.

Suggested Timeline

Webinars

Strategic Benefits Planning Hosted by Employee Benefits Advisor
[Listen to the archived version](#)

Elevate Your Client Relationships: Become the Trusted Advisor Hosted by Insurance Campus
[Listen to the archived version](#)

Tool Index

Step 4 Tools

Tool 4A: Benefits Strategic Plan Outline (PDF Format) Tool Tip for 4A: This tool contains the document outline that is discussed in Step 1 of the adjacent Workplan.

Tool 4B: Benefits Strategic Plan Template (Word Format)
Tool Tip for 4B: This is the full 26-page plan template which is ideal for circumstances when you need to provide a comprehensive deliverable.

Tool 4B-Excerpt: Benefits Strategic Plan Executive Summary

Work plans are succinct and easy to follow

Tools are at your fingertips for online access or download

SMART is NOT a client data repository, ensuring confidentiality

Our roadmap keeps you on track and illustrates to your client the process is clearly defined

Advantages



- **SMART is comprehensive.** Every tool you could possibly need to get through the benefits strategic planning process is included in the SMART toolkit.
- **SMART is invisible to the end client.** Our job is to allow you to present yourself in a professional manner, and to authoritatively lead your client through the benefits strategic planning process.
- **Every SMART tool is available in a Microsoft Office compatible format.** You should put your logo and corporate branding on everything that is client facing to expand the image of your organization.
- **SMART is NOT a repository for your client or prospective client information.**
- **We help you complete your first benefits strategic plan.**
- **You may use SMART with an unlimited number of clients or prospective clients at no additional charge.**

The SMART License



- SMART is licensed for an annual term. A license is based on the number of users in your organization. A user is defined as a production resource, account management or customer service resource. Each license includes:
 - SMART site access for your designated user group for 12 months
 - Unlimited use of SMART with clients and prospective clients
 - Assistance with the completion of a defined number of benefit strategic plans
 - Online – webinar training and orientation
- The following additional options are available and will be priced separately:
 - Private labeled website and program
 - Private labeled toolkits and tools
 - Proprietary advisor forum
 - In person, face-to-face training
 - Ongoing assistance with the benefits strategic planning process
- We will prepare a tailored proposal and licensing agreement to suit the needs of your organization



Strategic Marketing And Retention Toolkit

Benefits Advisors: Get SMART Today!

For Questions or Additional Information:

Jack Kwicien

Daymark Advisors

410.585.6571

jkwicien@daymarkadvisors.com

www.smartadvisors.biz

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