

SMART is an easy to understand toolkit, developed by benefits-industry veterans.

It is a thorough approach that starts with analyzing a client's strategic goals and operational issues. It provides step-by-step guidance to formalize a multi-year commitment between the client and advisor, and allows for more effective ongoing account management.

SMART is an invaluable tool for any advisor looking to reinvigorate, protect and deepen their client interaction.

Contact Us

SMART Strategic Marketing and Retention Toolkit
203 Harborview Drive – Pierside
Baltimore, MD 21230
Tel: 410-585-6570
Email: info@daymarkadvisors.com
www.smartadvisors.biz



"I wanted to share with you that the SMART deliverable proved to be a deciding factor in our recent win of a major university!"

Senior Vice President of Employee Benefits
Based in Indiana

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



Become a Trusted Advisor
Engage your clients in a benefits strategic planning discussion.



Simple. Easy. Effective.
Providing you the tools for success.



The Tools &
Support You Need
Go from vendor to partner.



Benefits Strategic Planning is made easy with the SMART 6-step process

We have diagrammed each step in the SMART process with an easy-to-follow workplan.

And we give you a **variety of SMART tools** to make implementation with a client very straightforward. From sample scripts, suggested fact finding questions, sample agendas, customizable presentation content, and form legal agreements, SMART gives you everything you need to hit the ground running!

In The Words of a SMART User:

"First, I want to extend our thanks and appreciation for allowing us to use the [...] SMART product. We have been using [it] to train our sales staff and redirect their thinking and approach with our clients and prospective clients and we are starting to see positive results. We had a process we were [internally] developing and attempting to follow but it just seemed to have too many moving parts. The SMART product offers two subtle but significant changes that really moved us forward.

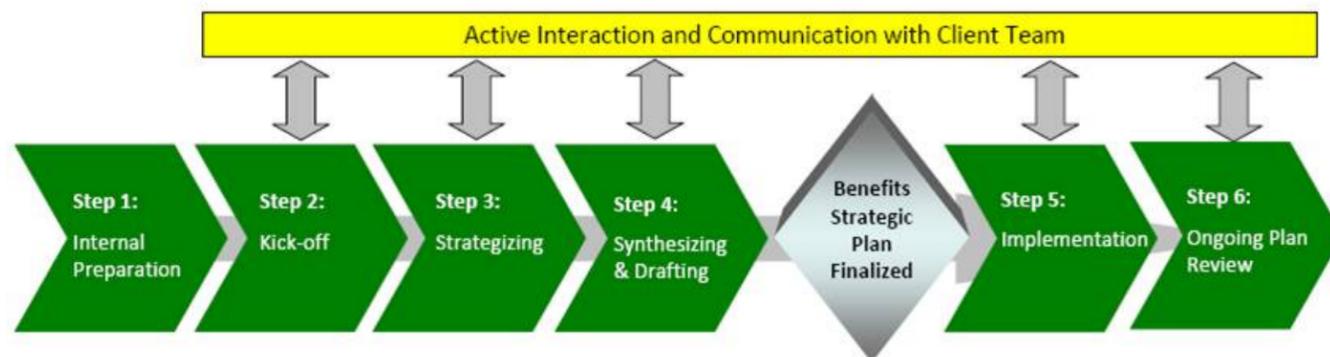
First, it is a much more clearly defined process with a visual presentation of the process. This makes it easier for the client to see how simple, yet effective, the process is.

Second, and most significant for us, we learned that we need to play a more significant role in controlling and leading the process. We were asking the client to pull together too much information rather than organizing the key information ourselves. As I went through your materials and saw this, the light bulb finally turned on. Of course clients were resistant to adding additional work to their plate but they are sure willing to work with us if we lay the appropriate groundwork for them. I think this is the key to success in implementing the SMART program.

[...] I think this is a great process and am confident it will finish a process change for our organization that we have been working on for some time."

SMART Strategic Benefits Planning Roadmap

© 2008-2009 Daymark Advisors, LLC



Start using SMART today!

SMART is **offered as an annual subscription**. You may use SMART with an unlimited number of clients or prospective clients. Upon subscribing, you will have immediate access to the secured, subscriber-only area of the SMART website – www.smartadvisors.biz.

Contact us today for a proposal tailored to the needs of your organization.

What You Get With SMART:

SMART Prospective Client Toolkit
SMART Existing Client Toolkit and proprietary 6-step benefit strategic planning process
Tools in native Microsoft Office formats
Voluntary Benefits Suite
Free user access to SMART discussion forum and eWorkshops
Initial product training and support to complete your first benefit strategic plan

SMART gets results. With SMART you will:

- Sell more products per client
- Generate more revenue per client
- Improve your client retention
- Become more profitable
- Increase your business asset value
- Diversify your revenue streams and reduce your reliance on commissions
- Transition from a product sales person to a trusted advisor