



Step-By-Step Guidance

A comprehensive system for success.

“We have been using SMART to train our sales staff and redirect their thinking and approach with our clients and prospective clients.

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

Second, and most significant for us, we learned that we need to play a more significant role in controlling and leading the process. I am confident SMART will finish a process change for our organization that we have been working on for some time.”

—Tom S., Iowa-based Agency Principal

Become a Trusted Advisor. Engage clients in a benefits strategic planning discussion with SMART (Strategic Marketing and Retention Toolkit)

SMART is a consultative needs-based sales system available to benefits professionals on demand over the web. SMART provides a well defined and easy to follow process for forward thinking benefits advisors to use when building, implementing, and managing benefits strategic plans on behalf of their clients.

The key to improved sales effectiveness, increased revenue, and differentiation from competitors

By using SMART, benefits advisors attract more new clients, sell more products per client, and elevate their stature from “vendor” to “trusted advisor”.

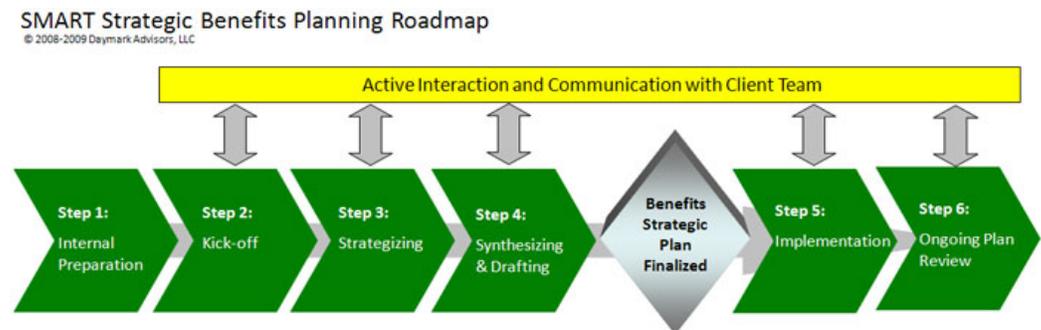
What is benefits strategic planning?

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.

A holistic and strategic approach leading to more effective marketing and improved client retention
 SMART enables the benefits advisor to focus on, and truly understand, the business issues of their client. As a result, benefits advisors gain control of the relationship earlier in the sales process, and are able to formalize a multi-year contractual relationship.

Make benefits strategic planning easy – with practice-enhancing sales tools

Developed by benefits industry professionals, SMART benefits strategic planning provides a clearly defined roadmap, pictured below, that anticipates everything the advisor needs. It has been designed in a modular, flexible fashion so a benefits advisor can adapt it to his or her personal selling style.



To learn more about SMART, visit us on the web at www.smartadvisors.biz or contact any of the following:

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