NATIONAL GROUP MARKETING

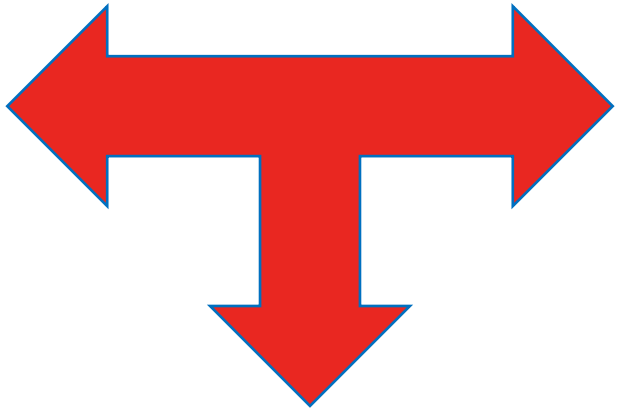
SaaS INNOVATION

Enroll with Ease:

A Direct Enrollment Platform with all the bells & whistles

Confluence

DLS INSURANCE GROUP



DLS INNOVATION GROUP

SaaS INNOVATION

The Journey to SaaS Innovation

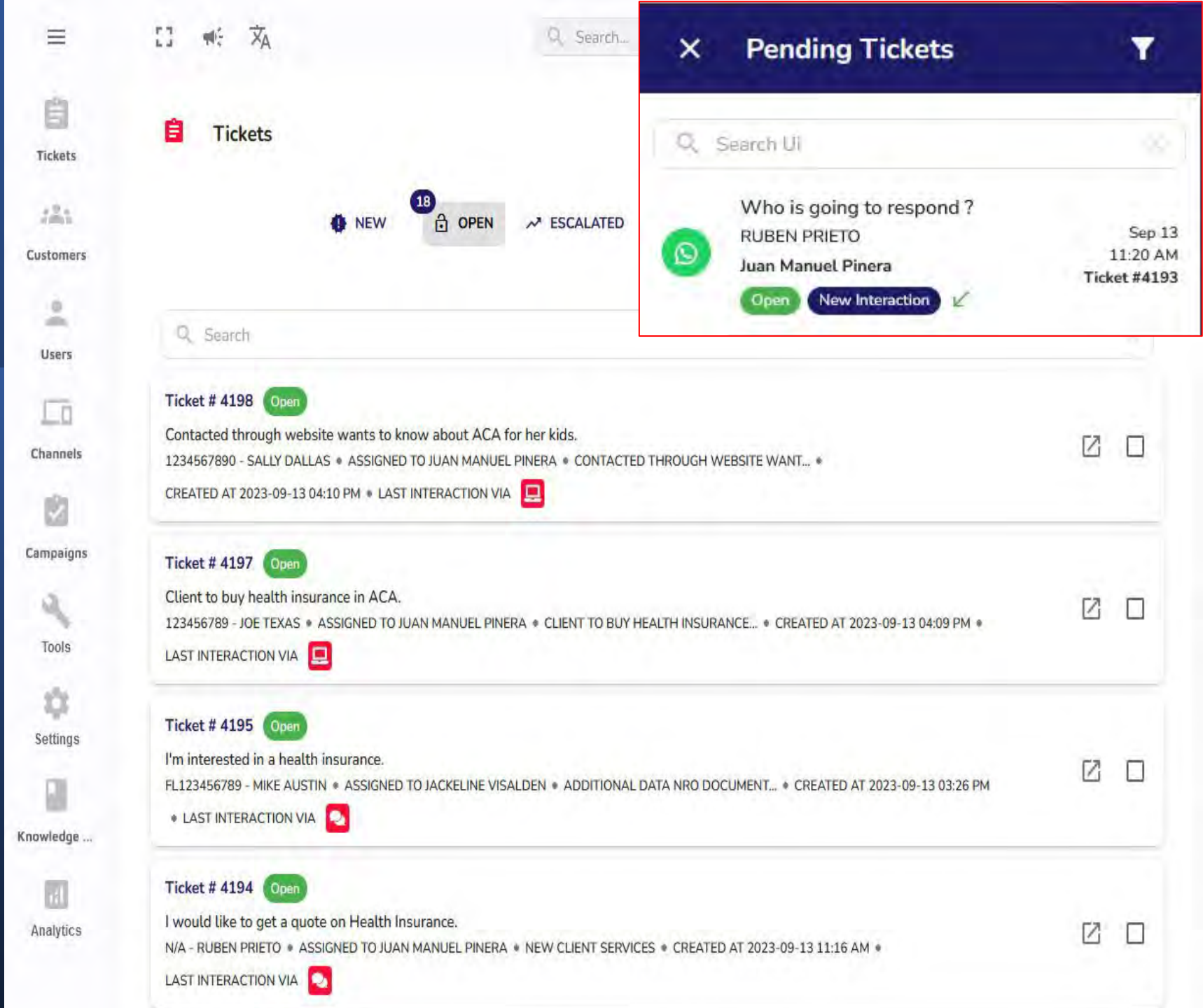
Five years ago, a discussion occurred between insurance, finance, and technology. The focus was the fragmentation in the Insurance industry and the “pain points” of agents and agencies.

This began the benchmarking of multiple products and technologies listed here. Each one helped build the platform that placed us ahead of the pack.

Vendor Comparison

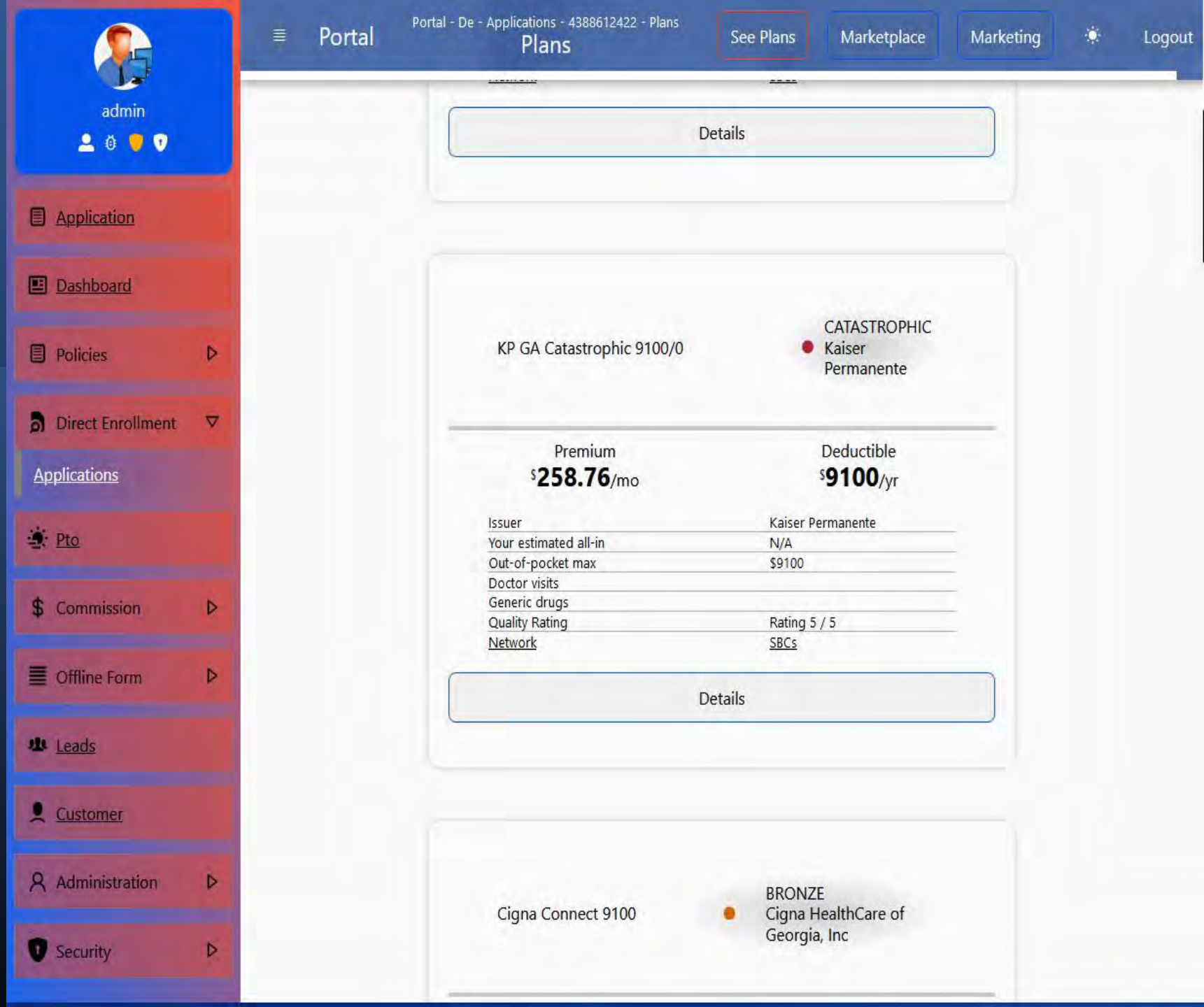
Features	benefitalign	HealthSherpa	insuresync	INSXCloud	Stride	SaaS Innovation
Customer **R**elationship **M**anagement	✓	✓	✓	✓	✓	✓
Direct **E**nrollment/EDE	✓	✓	✓	✓	✓	✓
Omni-Channel Marketing	✗	✗	✗	✗	✗	✓
Commissions Management	✗	✗	✗	✗	✗	✓
Telephony Integration	✓	✗	✗	✗	✗	✓
White Label	✗	✗	✓	✓	✗	✓
DATA Ownership	✗	✗	✓	✗	✗	✓
Complimentary Leads	✗	✗	✗	✗	✗	✓

Customer Relationship Management (CRM)



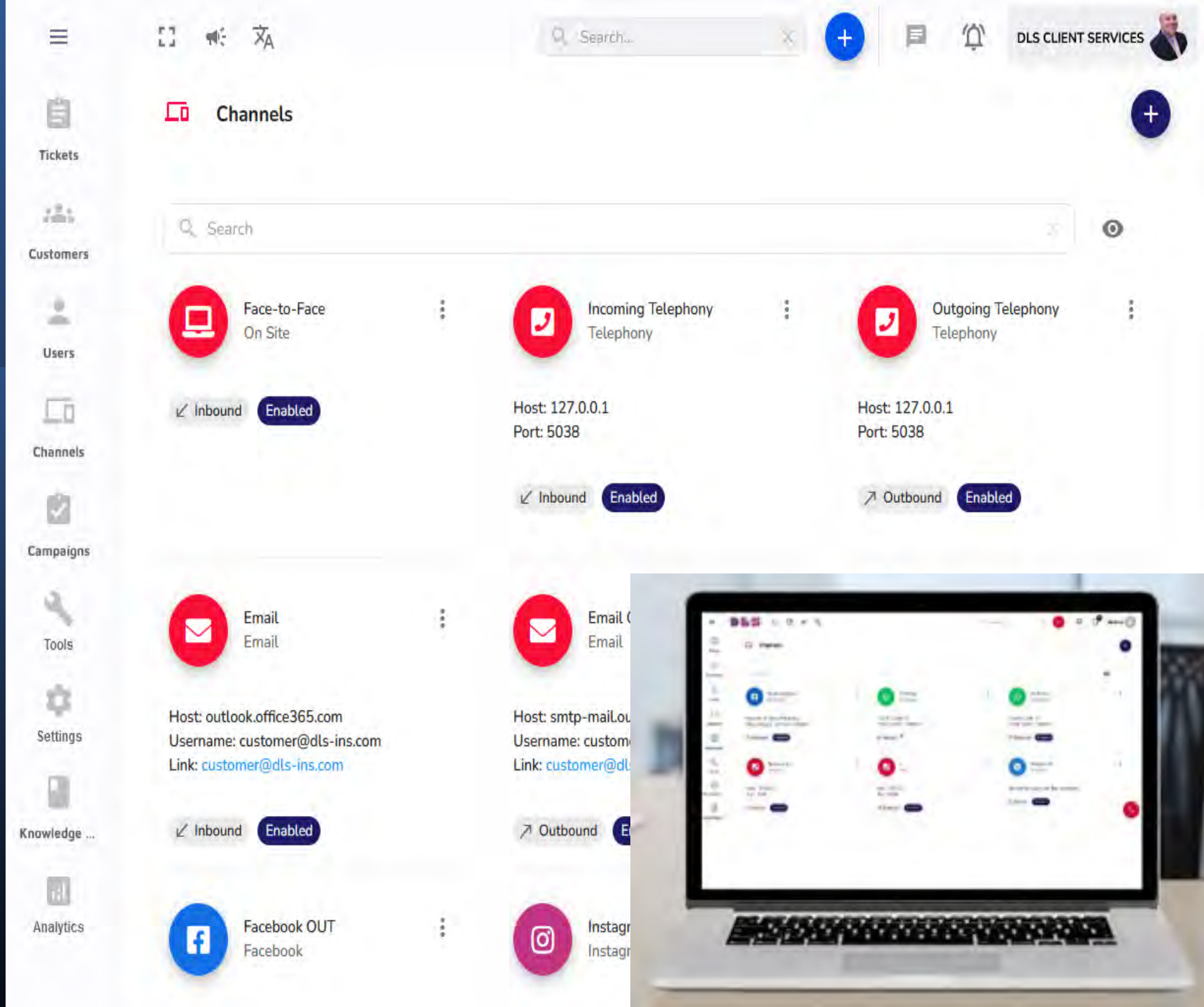
The CMS Trust Relationship

Direct Enrollment



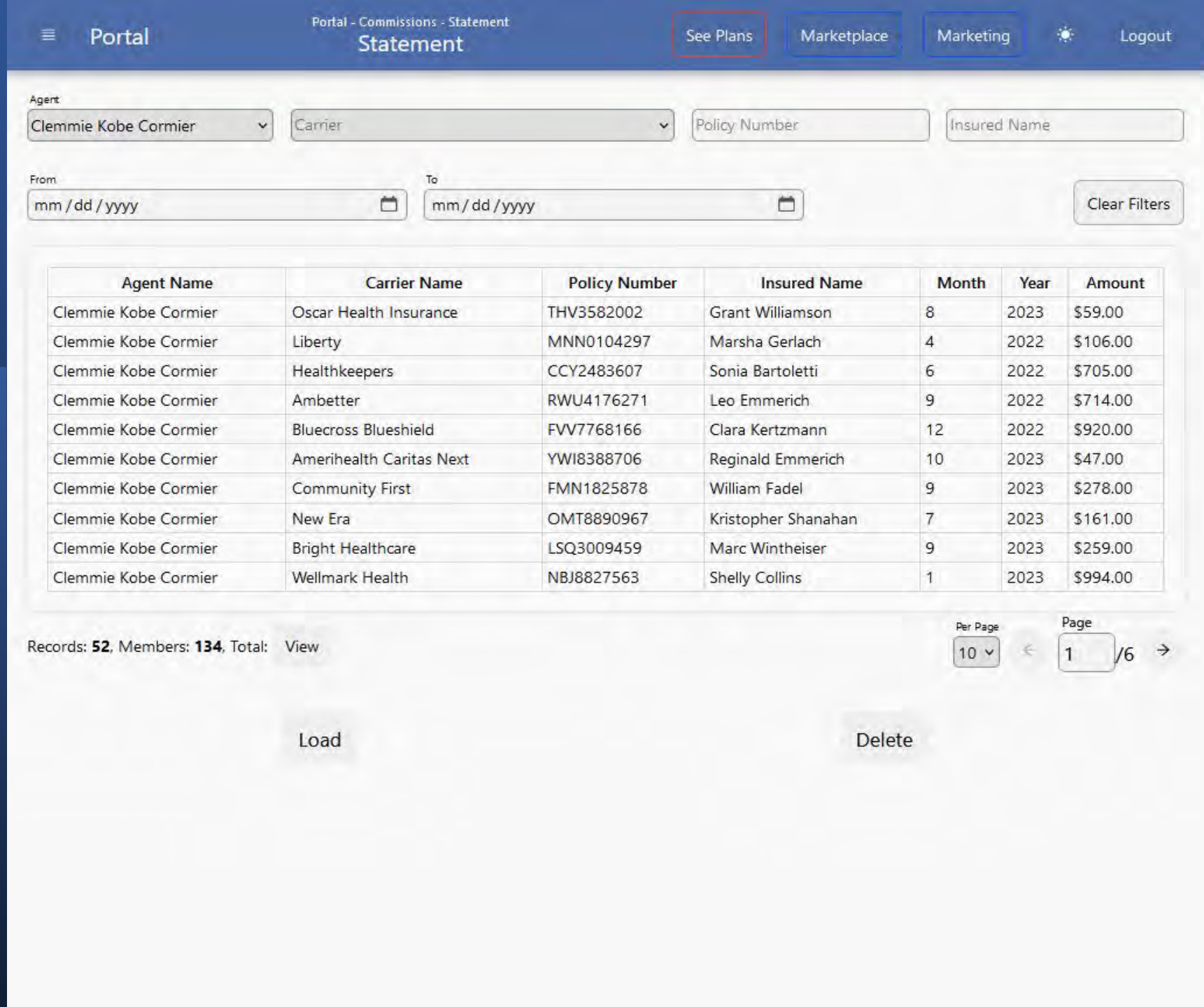
Reaching clients through multiple sources in an organic method

Omnichannel Marketing (email, sms, telephony & social media)



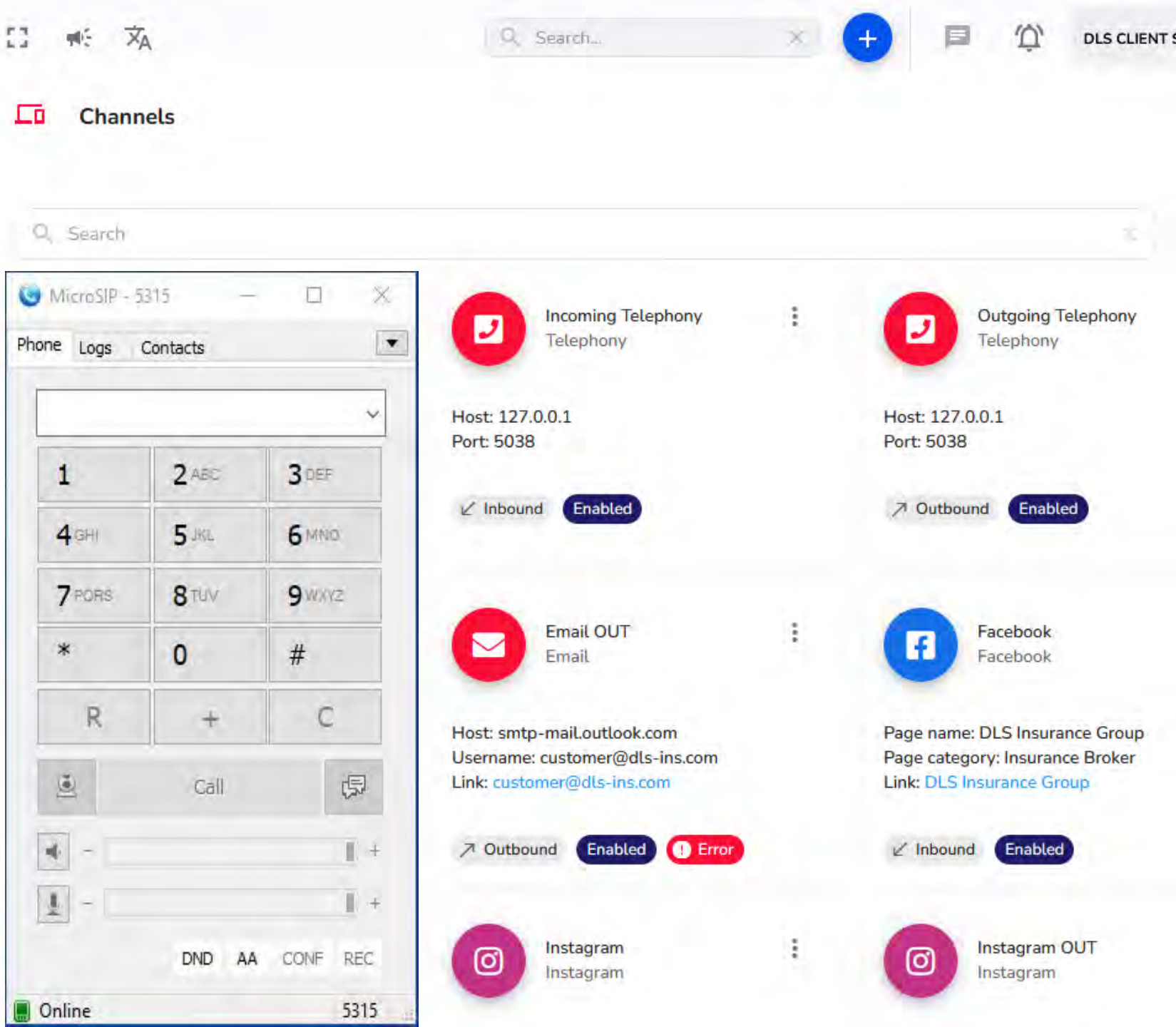
Another piece of the puzzle to PROFITABLITY

Commissions Management



The missing link to CRMs

Telephony Integration



It’s Your BRAND

Why give it UP?

White Label

Healthy Coverage FOR LIFE

AMERICA'S HEALTHCARE EXPERTS

DLS INSURANCE GROUP

NGM NATIONAL GROUP MARKETING

TAKING THE HELL YOUR Forever AGENCY OUT OF HEALTH INSURANCE

I4D Insurance4Dallas Health, Dental and Vision

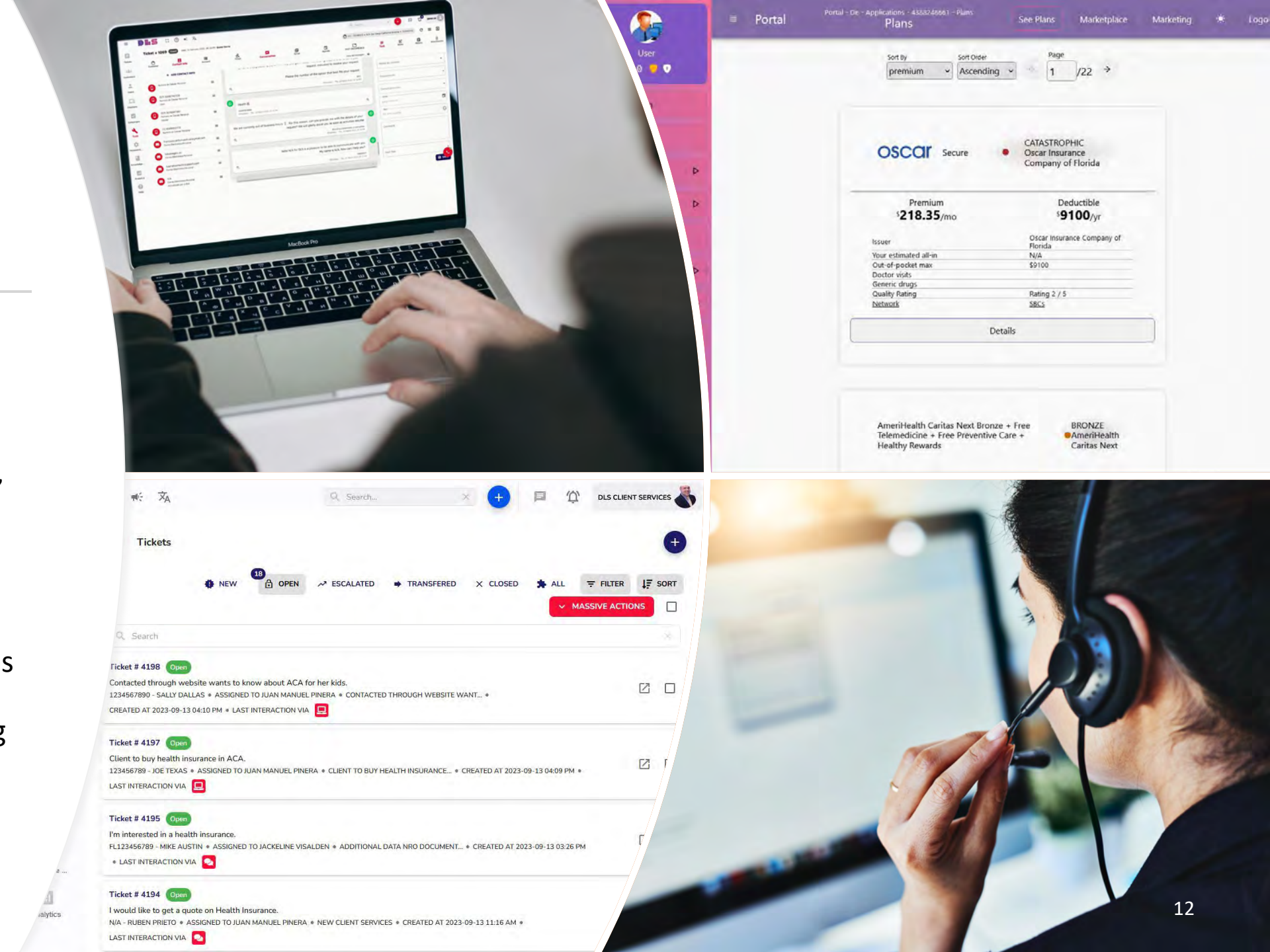
WILKERSON Insurance Agency

There is NO FREE LUNCH

DATA Ownership

Conclusion

- An ACA enrollment platform with customer relationship management, omnichannel marketing, commissions management, and telephony allows for a powerful tool for agencies, agents, and consumer satisfaction.
- Leveraging these features delivers a personalized experience. Thus, providing increased revenues, and improving overall operational efficiency.



Thank you

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