



## How BCS has helped one producer broaden his value beyond cost containment and into the world of compliance

For many years, employee benefits was a simpler world – quote insurance, service clients, help with administration – rinse, repeat – voila: a successful benefits agency is born.

In 2024, the world is much more complex. Benefits producers today have to be familiar with countless details about self-funding, stop-loss principles and functions, claims analytics, alternative options to traditional group medical, and more. For one producer, and for countless others, the pursuit of this knowledge, and its application in dozens and dozens of employer scenarios can consume an entire career.

Jared Blaudow is one such producer. For nearly a decade, he applied himself to learning the details. After years of practice, he was one of the best in the region. He became one of the top producers in his agency, largely due to his ability to navigate the details and communicate them effectively to prospects and clients.

However, after years of acting as a producer, he began to notice a trend. The expectations of employers surrounding the areas of compliance rose higher and higher. Competing agencies who were better prepared to address compliance stood out. It was a big problem, and all signs pointed to the fact it would only get bigger in the future.

### **Problem**

The primary issue Jared was facing was how to position compliance expertise as a differentiator for his agency. However, his personal lack of expertise, combined with the lack of resources of his agency left him less than prepared.

For any producer, confidence in your offerings is key to winning and keeping business. That confidence, understandably, began to wane.

He needed to get ahead of the issue, and fast. As a top producer, he had big goals for the year, and even bigger ones for years to come. His pipeline was full, but new business and renewal business would both start suffering if a solution wasn't found soon.

## Taking Action

Jared took the concern to his leadership team, who was quick to recognize the issue. His agency, Dimond Bros, hired Benefits Compliance Solutions for their Compliance Advisory Program (CAP), where BCS took several key steps:

- Step 1: Interviewed leadership to map out an understanding of the servicing & sales process
- Step 2: Identified key gaps in knowledge, tools, and resources available to both producers & operational staff
- Step 3: Implemented an agency-wide online & in-person training curriculum
- Step 4: Implemented an agency wide process & resource to quickly turn around complex compliance questions for prospects & clients
- Step 5: Provided agency with marketing materials related to compliance, including newsletter content, consulting on positioning statements, and more
- Step 6: Trained sales staff on the usage of Compliance Checkups for prospects – a unique tool that allows producers to position compliance front and center as a part of the sales process

These strategic actions were planned and executed to address the specific needs of Dimond Bros, ultimately aiming to improve the sales, retention, and operational efficiencies of the agency as a whole.

## What Happened?

As a result of these strategic interventions, Jared's anxieties had all but disappeared. Dimond Bros saw remarkable improvements.

One of the biggest changes happened as a result of **compliance confidence**. Because the entire agency now had the knowledge and resources in place, compliance concerns were no longer met with fear, but with the confidence you'd expect from a top-tier agency.

Among producers, this resulted in greater close rates for prospects that underwent compliance checkups. It also improved retention rates among those clients who now had fast answers to their frequent, and often complicated, compliance questions.

Among their operational staff, it resulted in huge improvements in efficiency. Problems that used to take hours (sometimes days) to research and address could now be either immediately addressed via improved internal skills, or in a matter of hours through BCS's expert help.

Among leadership, it put a cornerstone in place that allowed them to confidently plan their continued growth in the region.

The Compliance Advisory Program was everything Dimond Bros was looking for, and more.



*"As a producer, I've got cost containment down. Compliance? Not so much. For the first time in a 20-year career, BCS has come along side us and helped us set up processes that are making a huge difference. We recently had an employer tell us 'I've been waiting for this for years.' It's a game changer."*

Jared Blaudow | Large Account Sales Executive  
Dimond Bros Insurance

**Are you a producer, or are the producers in your agency facing the same growing concerns over compliance? Do you want to approach the subject of compliance with confidence rather than anxiety like Dimond Bros did?**

BCS offers a free, no-hassle consultation to help you gain clarity about what you're experiencing, and what you can do today to begin to turn the situation around.

We specialize in turning the challenge of compliance into an opportunity, just like we did for Dimond Bros.

Contact us now by scheduling your free consultation: [bit.ly/BCSintrosession](https://bit.ly/BCSintrosession).