



DYNAMIS CASE STUDY

Company Background

Employee Benefit Services of Maryland, located in Baltimore, MD, is a fast-growing employee benefits agency committed to providing the best benefits planning experience for clients. The agency offers a range of value-added solutions available to clients, including compliance updates and enrollment support. Their team consists of six producers and several account managers, as well as a dedicated leadership team.

The Challenge

The managing partners of EBS of Maryland, Ryan Sullivan and Leo Gallagher, first heard about Dynamis from a colleague at another agency. Their colleague shared he was using Dynamis to help simplify new ACA requirements and provisions, including adjusted community rating.

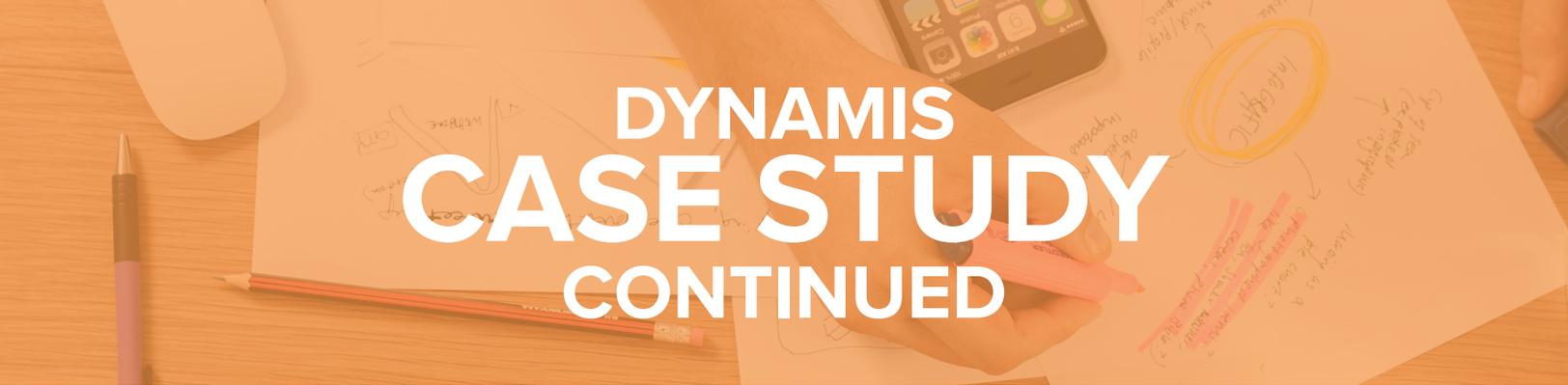
Sullivan and Gallagher knew the adjusted rates would be a challenge, so they decided to check out Dynamis as an addition to their client service arsenal. After viewing the capabilities of the solution, they knew its value far surpassed just ACA support. Gallagher said, “It was so effortless to put that presentation up on a screen and talk through it. After seeing it, I don’t know how brokers do it any other way.”

Addressing the Challenge

As the agency began implementing the Dynamis tool and integrating it into their solution packages, it became even more clear that it was invaluable to their agency. The agency worked with several employers with complex and/or robust benefits plan, and the feedback from clients was immediate. Clients thanked them for the new approach to their renewal, and felt it made decision-making “effortless.”

Gallagher shared that the Dynamic Plan Designer was critical for their larger groups and more complex plan offerings. “You just can’t do the same thing with a spreadsheet,” he said.





DYNAMIS CASE STUDY CONTINUED

The Result

The Dynamic Plan Designer, in concert with other agency solutions, has contributed to annual 15-20% agency growth over the past few years. In addition to using the tool with its most complex groups, EBS has also found success using it with smaller groups, who make up a significant chunk of the agency's book of business.

Gallagher shared that before using Dynamis, renewal meetings were tough to manage with everyone in the room flipping through pages of a spreadsheet. With Dynamis, "everyone's attention is on the screen, facilitating better a conversation." Preparation was also vastly simplified—per Gallagher, "you can get the data in and put together a proposal in just 15 minutes." Using Dynamis allowed EBS to generate more big-picture conversations to help save clients money, rather than focusing on the minutia of copays and other plan details within a spreadsheet.

The internal feedback since introducing the Dynamic Plan Designer was also positive. Sales felt it was a fantastic marketing tool, while account managers found operational efficiencies and time saved as a result.



Operating in the very competitive mid-Atlantic market, Gallagher stated, *"I just don't know how other brokers are surviving without a solution like this. I can't see how someone can present a spreadsheet and say 'here's your renewal.'"*

