

# 3 Ways to Streamline the Small Business Quoting Process

PULLING QUOTES FROM MULTIPLE CARRIERS

SWITCHING FROM PAPER APPLICATIONS TO ONLINE APPLICATIONS

RECEIVING VALID E-SIGNATURES



# Challenge #1: Producing quotes from multiple carriers with minimum effort

It's very time-consuming to pull multiple quotes from Carriers for each Employer, not to mention keep track of all that information. And what if an Employer wants to update their Employee or organizational data just slightly? Brokers are forced to go back into a carrier portal to pull another quote.

With a tool that allows **viewing of multiple medical carriers at once**, that time is significantly reduced. Brokers can gather quotes from carriers using one source of basic info. That means basic census data is collected once, and quotes can be pulled from any applicable carriers. Even better, Brokers can pull details from any Carrier, for any plan into the same work session, offering side-by-side comparisons with what their Groups already have.

The image shows a laptop displaying the FormFire web application. The interface is titled "FORMFIRE" and includes navigation links for "Help", "Account Settings", and "Logout". The main navigation bar shows a progress sequence: "FormFire Profile" (highlighted), "Coverage", "Health Questions", and "Review & Sign". The "FormFire Profile" section is active, displaying a "Personal Information" form. The form includes fields for First Name (Bedy), Last Name (Jones), DOB (01/19/15), SSN (\*\*\*-\*\*-1254), Sex (Fem), Marital St. (Marr), Date Marr., Height (4 ft 7 in), and Weight (130 lbs). A "Resource Center" notification is visible in the bottom left. The right sidebar contains a "FormFire Profile" summary with status indicators for Personal Information, Contact Information, My Employer, and Family & Household, along with a "Need Help?" section with contact information and a "Chat" button.

# Challenge #2: Collecting and Scrubbing Paper Applications

Collecting paper applications can be an extremely tedious task, triple that time when medical information is required, but there is a way to alleviate that stress. **Using an online approach streamlines the collection of health data.**

Rather than dealing with the same questions being asked multiple ways, dozens of which overlap, an **online interview** walks through a series of specific medical questions that cover all the needs. A tool like this takes a lot of the guesswork and blank answers out of the process. The interview process knows how to help an Employee fill out data they may not be sure of, while also basing the next questions off an Employee's previous answers.

When collecting paper applications, Employees often miss certain pieces of information, or leave fields blank when they're unsure of the response.

Utilizing a feature that can **check for missing or inconsistent information** would greatly reduce the manual time spent correcting data. This information can be corrected before it gets passed on down the line. This ensures that the information sent to Carriers is consistent and complete. Plus, it reduces the administrative work of reaching back out to Employees for additional information, saving time and aggravation while providing more accurate quotes.



## Challenge #3: Receiving valid, trusted signatures for all documentation

E-signatures are an important part of cutting down on the amount of paper involved in the quoting and buying process. Not all e-signatures from third party software or platforms are created equal. There are many legal and compliance issues that an e-signature must pass before being valid. That's why having an e-signature that is the most universally recognized and accepted by carriers is important.

**E-signatures also take the task of getting signatures on paper applications away.** Brokers no longer have to track down Employees if they forget to sign one page in a sea of other pages.

Being able to cut down on the amount of time spent on the more tedious tasks while still producing the same output, means Brokers will have more time to spend with potential clients, building the opportunities to bringing in new revenue in the process.



For Brokers, quoting season produces many great opportunities to generate new business and retain existing clients. Unfortunately for many, the time and energy it takes to collect employee information, generate quotes, and enroll new clients prohibits the ability to sell more efficiently.

FormFire's platform makes the entire quoting process simple and streamlined, allowing Brokers to focus on what matters most – customers.

[Demo FormFire today](#), or contact us at (216) 502-2324 for more information.

