



# Sanford & Tatum improved data quality by 20% and won new business with Employee Navigator

INTEGRATIONS | CASE STUDY

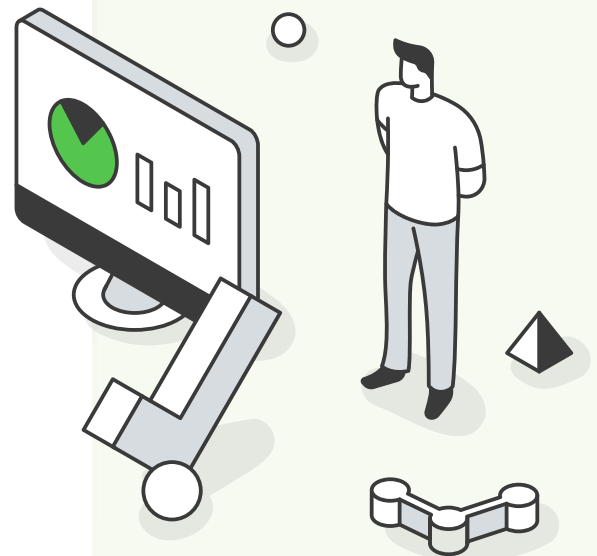
## Challenge

As one of the premier independent insurance agencies in Texas, Sanford & Tatum believes that the best way to serve clients is to stay close to them wherever they may be. In a region where a white glove service model is expected, the amount of manual work the agency took on increased exponentially as they grew, leaving room for costly mistakes. “We have a full-time employee that previously did nothing but process new hires, terminations and changes manually.”

The agency knew that maintaining strong client relationships in today’s competitive environment meant deploying modern technology solutions. “This was a strategic approach to our book of business. We moved our MetLife book of business to the Employee Navigator integration to remove the manual processing and bolster our commitment to service.”

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Tabatha Burgoon | Sanford & Tatum



## Deploying a Digital Strategy

With a large book of MetLife business, the availability of a direct integration just made sense. “Carrier integrations require less busywork for our agency and were something that we could incorporate without needing to grow our team. Employee Navigator has allowed our agency to work more strategically with a focus on data integrity and client satisfaction.” With integrations in place, Sanford & Tatum was able to reduce errors by 20%. In the rare occurrence that there is an issue, the agency can quickly remedy it with additional internal resources made possible by the reduced workload.

When quoting new business, the process of selecting carriers at Sanford & Tatum boils down to their integration, or lack thereof, with Employee Navigator. “We set standard quoting procedures the 1st of every year for our smaller groups because there's so many ancillary carriers out there,” said Tabatha. “The top indicator as to who's going to make that list is if they are integrated with Employee Navigator. MetLife, in our experience, has been a standout with regards to the integration process by simplifying the enrollment process for our clients.”

Employee Navigator’s modern carrier integrations have also allowed Sanford & Tatum to offer products that they wouldn’t previously have introduced to clients due to the workload and smaller margins involved. “Some groups are not well versed in how short-term or long-term disability work, but they have it now because Employee Navigator and the integration manage it seamlessly.”

# 20%

Reduced errors during transmission

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## Results

These days, all new groups use integrated carriers on Employee Navigator when possible. “With MetLife and other carrier integrations, we have been able to transition one of the employees in our agency from a fulltime data processor to a small account manager.” This has enabled Sanford & Tatum to do more and be more present with clients. “One of the biggest advantages to having carrier integrations like MetLife is the time that is saved during open enrollment processing. This was an overwhelming benefit during the last fourth quarter when we had so many plan renewals at the same time.”

The benefits of integrations extend further than time savings and data quality. When prospecting new clients, Tabatha says that “everybody has Employee Navigator, but they don’t all have the internal expertise to fully leverage it. Pairing technology with our white glove service model has become our differentiator.” Once a new client is onboard, Employee Navigator continues to pay dividends by delivering the stickiness necessary to retain them. “The stickiness Employee Navigator creates was a determining factor in our decision as an agency to choose it. We build out an integration portfolio so that clients, if they do ever decide that they want to change brokers, will need to give it some serious thought.”

Ultimately, Employee Navigator allows agencies like Sanford & Tatum to spend more time advising their customers, which is why they entered the industry to begin with. “We value the autonomy that Employee Navigator offers us and the fact that they work with all carriers to continue to support the digitization of the employee benefits market.”

“Carrier integrations like MetLife have allowed us to save time, energy, effort and streamline internal processes.”

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