

## > Employee benefits lead generation and plan analysis tools to help you increase your market share.



### OVERVIEW:

The American Directory of Group Insurance and the Directory of Self-Funded Group Plans provide the freshest, most accurate data on the market with the tools you need to analyze it and drive your business forward.



- Plan decision-maker emails with added LinkedIn integration
- One-click queries of our most popular searches



- Critical data including size of the plan, its funding arrangements, lines of coverage, premiums, and other plan facts
- Presentation-ready reports

## What are the Group Directories?

The American Directory of Group Insurance and the Directory of Self-Funded Group Plans support the lead generation and prospecting efforts of sales and marketing professionals in the employee benefits space with current, comprehensive and accurate form 5500 data and tools. At every step leading up to prospective client appointments, the directories deliver valuable data and tools to help you grow your market share.

## Connect with one of our knowledgeable reps today.

Call 800-231-0669, option 1 | Email [sales@judydiamond.com](mailto:sales@judydiamond.com)

Visit [www.judydiamond.com/Group-Insurance-Directory](http://www.judydiamond.com/Group-Insurance-Directory)

[www.judydiamond.com/Self-Funded-Directory](http://www.judydiamond.com/Self-Funded-Directory)



# Top 5 Things You Can Accomplish with the Group Directory and Self-Funded Directory

1

## Find Plans That Look Like Your Best Clients

- Think about what your most profitable customers have in common with one another. They might have a similar number of participants, belong to a certain industry, be located in a certain area, or offer certain voluntary benefits. Whatever they look like, the Group Directory and Self-Funded Directory can help you *find more clients just like them*.

2

## Prioritize Leads with Current and Comprehensive Data

- Only Judy Diamond Associates gives you historical perspective on each plan. With filings dating as far back as 1999 in our tools, you can familiarize yourself with the long-term context in which plan decisionmakers are operating and tailor your pitch to their individual situation.
- Monthly updates from the DOL keep our database fresh and our information meaningful. Other vendors imply their data is more recent than ours, but they are relying on data gimmicks to do so. Don't be misled.

3

## Outsell the Competition

- Target your competitors' clients. We have an exhaustive data cleansing process that results in far more accurate search results when you look for plans that are serviced by competing brokers, carriers or other providers.
- Estimate the strength of a plan's relationship with its providers by looking at the length of their relationships – courtesy of the graphical timelines we create using our unparalleled amount of plan historical data.
- Adjust your pricing based on the current providers' fees and commissions to appear more favorable.

The image displays three overlapping screenshots of the Judy Diamond Associates software interface. The leftmost screenshot shows the 'Exclusive Plan Sponsor Contact Details' page, featuring a sidebar with navigation options like 'Dashboard', 'Search Center', and 'Results'. The main content area displays details for '1-800-FLOWERS TEAM SERVICES INC', including company contact information and a 'Sponsor Summary' section with fields for 'COMPANY CONTACT INFORMATION', 'HUMAN RESOURCES', and 'FINANCE'. The middle screenshot shows the 'Plan Providers Details Page', which includes a 'Plan Providers' section and a 'SCHEDULE A CARRIERS TIMELINE' chart. The rightmost screenshot shows a 'Plan Report' for '1-800-FLOWERS TEAM SERVICES INC. GROUP HEALTH AND WELFARE PLANS', featuring a 'CONTACT INFORMATION' section and a 'PLAN FINANCIALS' table.

	Current	1 Year	3 Year	5 Year
Total Assets	\$0	\$0	\$0	\$0
Total Income	\$0	\$0	\$0	\$0
Net Income	\$0	\$0	\$0	\$0
Total Expenses	\$0	\$0	\$0	\$0
Total Administrative Expenses	\$0	\$0	\$0	\$0
Paid to Participant	\$0	\$0	\$0	\$0
Paid to Insurance Carrier	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0
Total	\$0	\$0	\$0	\$0

Exclusive Plan Sponsor Contact Details

Plan Providers Details Page

Plan Report



### Schedule Meetings with Plan Decision-Makers

- Finding the right targets and using plan details and competitive information to craft your pitch are important, but only if you can reach the right people at the plan. We reach out to the plan sponsors directly to obtain the names, titles and email addresses of their plan decision makers (HR, benefits and CFOs) so you will know how to get in front of the leaders. We've also added LinkedIn integration. LinkedIn is a critical tool that can make your prospecting faster, smoother and, ultimately, more profitable.

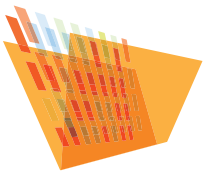


### Impress Prospects with Your Grasp of Their Needs

- Download presentation-ready reports on each plan before you head into your client meetings so you have all of the key facts and figures on hand and professionally laid out. Alternatively, download your results into Excel for maximum efficiency.

## Who should consider using these directories?

- Sales and marketing professionals in the insurance industry looking to find new qualified employee benefits leads or validate current leads.
- Business Intelligence and Market Analytics professionals who need to assess competitive offerings and prices to inform important decisions and marketing plans.



### Request a Free Trial

Find out if the American Directory of Group Insurance and the Directory of Self-Funded Group Plans are the right solutions for your team's lead generation and plan analysis needs with a free trial subscription.

**Visit** [www.judydiamond.com/Group-Insurance-Directory](http://www.judydiamond.com/Group-Insurance-Directory)  
[www.judydiamond.com/Self-Funded-Directory](http://www.judydiamond.com/Self-Funded-Directory)





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