

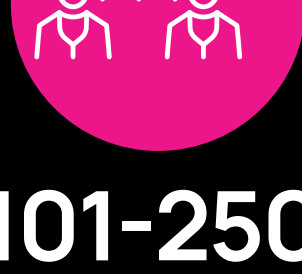
How Competitive Are Your Consulting Strategies?

Brokers' HR, Benefits and Financial Advisory Trends in Focus

It's not uncommon for business owners to seek guidance from their trusted advisors on a variety of human resources (HR), benefits and financial topics—from human capital management referrals to support with the Consolidated Omnibus Budget Reconciliation Act (COBRA).

To get a better understanding of these unique relationships, isolved surveyed a group of brokers to uncover the current state of HR, benefits and financial advisory.

Current Snapshot



101-250 EEs

Typical Client Business Size



FMLA/Leave Management

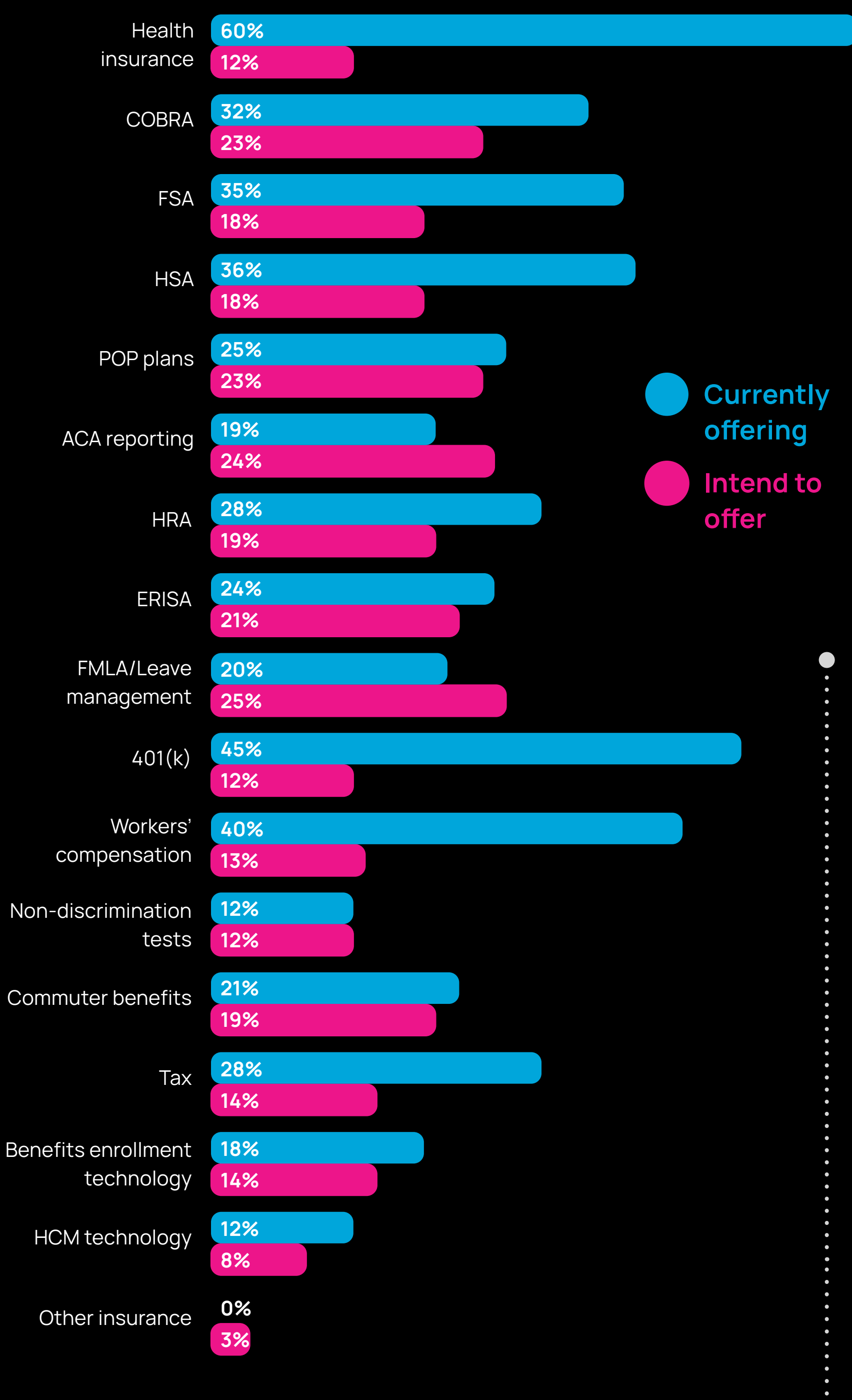
Service Most Likely to Add On



Health Insurance

Service Most Offered or Advised On

Sixty percent of brokers are advising their clients on health insurance, while 25% plan to start advising on the Family Leave Medical Act (FMLA) and leave management within the next year.



Top Client Concerns

1.

Rising healthcare costs

2.

Offering competitive benefit packages

3.

Improving the employee experience

Rising healthcare costs is the top concern clients brought to their brokers over the last year. This makes sense, as benefits play a big role in overall employee experience (EX)—even giving organizations a competitive advantage when it comes to recruiting and retaining top

Future Opportunities

Artificial Intelligence

Brokers say their top opportunity in the next year is **integrating artificial intelligence (AI)-driven analytics for tailored employee benefits**. This can help their clients provide better benefit experiences, which is essential because **45% of employees** say they'd look for a new job after experiencing a poor benefit experience.

Human Capital Management

Just **12% of brokers** are referring **human capital management (HCM) technology** to their clients, with 8% planning to offer support within the next year. When it comes to helping clients stay competitive, referring them to the right HCM partner can make all the difference.

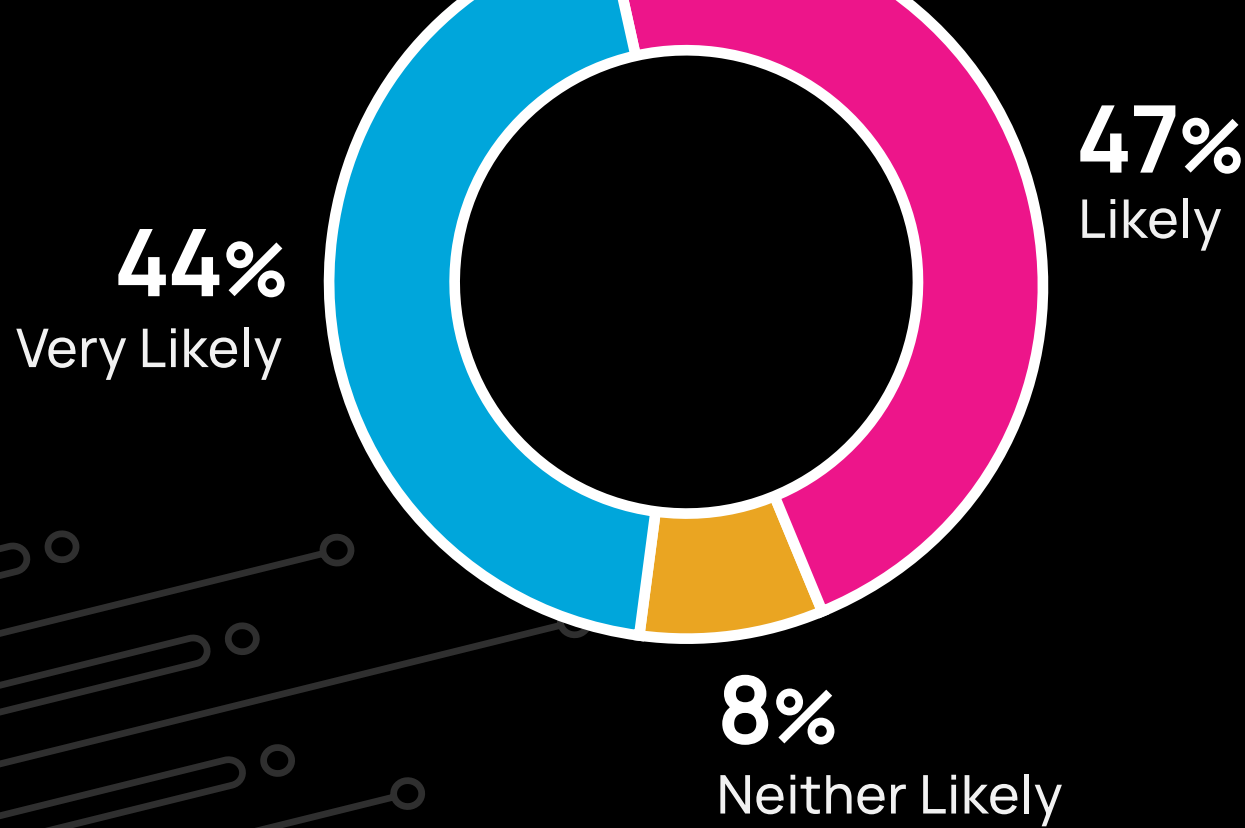
A recommendation for isolved, for example, strengthens the advisor-client relationship because clients benefit from an HCM vendor that is:

Secure and stable, protecting sensitive employee data through robust encryption and safety audits.

Scalable, with intelligently connected solutions designed to grow with unique business needs.

User friendly, with technology designed to give clients—and their employees—consumer-like experiences.

In fact, 91% of brokers are likely to refer their clients to isolved.



Give your clients a competitive advantage by recommending isolved.

[Learn More](#)