



## Insurance Associates Employee Benefits, Inc

### Client

Insurance Associates Employee Benefits, Inc.

### Industry

Specializes in retirement and employee benefit plan designs, benefit administration and employee communications.

### Location

Located in LaGrange, KY, the firm has 5 locations throughout the state.

### Challenge

IAEB looks to engage clients beyond open enrollment, and attend to client needs through the year.

### Solution

BASIC Guru platform -- that facilitates and accentuates our expertise and compliance support.

While Mark Viehmann, President of Insurance Associates Employee Benefits, Inc. (IAEB) considers himself a rules guy, there are few people who can make a conversation about insurance and rules as colorful and engaging.

"There are two kinds of insurance people," he insists, "rules people and sales people. If you can roll up a sales guy with a rules guy, you've got dynamite."

It turns out that Viehmann has lots of material to work with, as IAEB dates back to 1926. Over the years it's undergone several ownership changes and as of this writing has grown to include 5 locations, the newest in LaGrange, KY. IAEB specializes in retirement and employee benefit plan designs, benefit administration and employee communications. IAEB looks to engage clients beyond open enrollment, and attend to client needs through the year.

According to Viehmann, IAEB's expertise, their compliance support, and their technology are their core differentiators. Indeed, it's their technology -- the BASIC Guru platform -- that facilitates and accentuates their expertise and compliance support.

"This business has changed, you need your A game if you're going to be competitive and win business -- and, as importantly, win trust over time, particularly as clients are relying on you to help them navigate the changing regulatory world. You have to have knowledge, but you also need the tools."

Several years ago, a friend in the industry referred Viehmann to BASIC Guru.

"I've used every piece of technology at least once," said Viehmann. "The good ones twice."

When he visited the BASIC Guru site, he "kicked around on it" for a while, and asked questions. A lot of them.

"Having six children makes you ask better questions -- what I call 'why daddy' questions. You know, why is the sky blue daddy, why is the grass green daddy? You learn to break things down and ask questions that enables you to get a fundamental -- or, pardon the pun, basic -- understanding of what the technology can do, how it does it, how it fits what you're looking to do. Once I got a foundation of what BASIC Guru can do and how it works -- why does it connect like this, if I push this what happens -- I was able to build on my understanding. You keep peppering them with questions...the gattling gun is alive and well!"

Viehmman was ultimately sold on the platform's flexibility and BASIC's responsive support.

"Usually when you ask if they can tweak a process or add a feature, other vendors are like, 'we can't do that, or we'll get back to you or we need to call corporate to get approval.' When in most cases it's just a simple programming issue or a question of connectivity."

Viehmman's experience with BASIC Guru's support has been just the opposite - as he speaks glowingly of their responsiveness, eagerness to accommodate his specialized needs, as well as their accountability and integrity.

"At IAEB we treat clients like partners. We're about cultivating relationships built on trust and mutual respect. We don't play games with our partners. That's exactly how we view BASIC Guru - they're not a vendor, they're our partner. In fact, I've told them numerous times, if it's ever different we'll have to separate."

At present there's little if any separation, as "BASIC Guru is part of my conversation every second of every day."

In addition to facilitating a range of agency processes, from enrollment to communications, BASIC Guru goes to the heart of what Viehmman does and what he most values.

"Look, I'm an insurance nerd, as I said, I'm a rules guy. If you're my client, I don't want to get you in trouble. BASIC Guru has been and will continue to be a huge help in assuring compliance; their resource library gives us and our clients access to all the documents they need, including SBC docs, which helps me keep them out of trouble and saves them from getting hit with unexpected penalties. Bottom line is if you can manage your clients' insurance, benefits, communications and all their compliance issues, you're magic. They'll love you forever."