



Choosing a technology partner that delivers a dedicated, integrated strategy

The broker landscape has been transformed within the last several years. Employer-clients have a lot of demands on their time and are often spread very thin, asked to do more with less. With that, they expect maximum support from their broker and in an expanded capacity.

As the HR technology consulting practice leader at ABD, Megan Coen explains that ABD is often involved in client HR and benefits-related technology decisions and strategies.






"We've established a strong practice that really focuses on strategic advising of clients that want help and guidance on the HR technologies that are out there, because it's a very complex, very crowded space right now," says Coen, who heads a five person team. "So it's very exciting for us." More and more clients today are asking for an integrated Human Capital Management (HCM) system, especially because these integrated solutions are no longer the domain of larger employers. In fact, Coen notes, firms today with 150 to 300 employees no longer have to use disparate systems and deal with the problems they can bring, such as double data entry, siloed data, etc.

"In the past, that was acceptable, but even among small and mid-level employers the appetite for true integration is growing; we see that in the market all the time," she says. "For me, as a technology leader within ABD, it's the first problem that I try to solve for a client who comes to me and says, 'I want to talk about my HR technology suite.' Having systems that can't communicate at all or don't communicate reliably — whether it's from a benefits system to payroll, or a benefits system to a benefit carriers — is probably the single biggest pain point HR teams share with me."

Megan Coen
HR Technology
Consulting
Practice Leader



Quick facts

-  **Company:** ABD Insurance & Financial Services
-  **Headquarters:** San Mateo, California
-  **Industry:** Boutique consulting firm providing risk management, insurance brokerage, human resources and retirement consulting services
-  **Employees:** 220
-  **Product:** ADP Workforce Now®

Learn more about ABD
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As soon as we advertised the fact that we had this new partnership arrangement with ADP we had very quick, positive responses from many clients.

Solution: Taking advantage of the perks ADP's Partner Program has to offer

According to Coen, ABD's advisors offer guidance and craft innovative solutions to help address risk for clients of varying sizes, growth stages and industries. With that, one of her main challenges is developing and implementing ABD's client technology strategy — what systems ABD can support, how to support them, what key vendor relationships to utilize, and more.

"ABD is very close to the client's HR organization, serving really as an extension of their HR team," she says. "It's natural that they would lean on us to help support their technology needs. Especially in the benefits space or the HR space, which are the areas that we touch quite frequently for them. We knew that we needed to answer the call that our clients were putting out. We needed to be able to fulfill that need for them."

To make that happen, ABD turned to ADP as an expert with a deep understanding of the HR and benefits broker role, as well as what it means to be a strategic partner. ABD was quick to take advantage of ADP's Partner Access, a technology platform that provides access to tools and reporting a broker may need as an advisor to their clients.

"We looked at which technology vendors were investing in those types of partnership relationships, which means making it easier for brokers to support our clients, rather than harder," she says. "It's very telling that as soon as we advertised that we had this new partnership arrangement with ADP, we had very quick, positive responses from many clients. [Our clients] know how much they lean on our team for things like open enrollment changes, or being able to research issues on their behalf. That's really very valuable to them."

She adds that ABD clients interested in a solution like ADP typically have experienced the pain of systems that don't communicate. As a result, they want a solution that is integrated out of the box.

"There's such a strong return on investment with a fully integrated, one-stop-shop solution," Coen says. "And that's a primary reason to moving to ADP. For us, it's the biggest selling point — how well integrated the ADP HCM solution is — a single platform that touches the entire HR process."

Coen highlighted the benefit of working with a broker who is experienced with your technology partner and can access support offered through Partner Access.

"That's a very big deal to us," she says. "It shows that we have a lot of ADP expertise in-house and that we can leverage it for our clients' benefit."

ADP is a really flexible, scalable solution. And that's what we need in a partner.

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In some cases, ABD has asked ADP for targeted training with very specific needs for a client and ADP has always provided that.

As for ADP Partner Access, Coen says it offers “excellent, unprecedented access” to client data via a simple authorization signature, which means much less work for the ABD client.

“It’s a lot less work for clients to maintain our access, and much less stressful for us too, and we have better redundancies in place,” Coen says, adding that as another perk, ABD gains access to a dedicated team of senior professionals that works exclusively with partners, and she is confident that her team can get answers to questions quickly.

“I trust that ADP Partner Access will either have the answer or will quickly get us to someone who has the answer, and will work with us and stay on top of it until it’s resolved,” she says. “That level of professional activity and follow-up, along with transparency, has made a big difference. That is what we need in a partner.”

With ADP, we have access to a team of senior professionals that always works with partner firms, and I feel confident saying we can find the answer to a question quickly.

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