



Choosing a technology partner that delivers a dedicated, integrated HCM strategy

Megan Coen, HR technology consulting practice leader for ABD Insurance & Financial Services Inc. — a boutique consulting firm providing risk management, insurance brokerage, human resources and retirement consulting services — spoke with us about the changing brokerage landscape and the importance of a truly integrated solution for their clients and the partnership required to deliver it.

Business challenges

ADP®: What are the main business challenges you face?

Coen: The landscape for benefits brokers has been transformed within the last several years. Employer-clients have a lot of demands on their time and are spread very thin. They are frequently asked to do more with less. With that, they expect maximum support from their broker.

ADP: What kinds of support are clients looking for?

Coen: ABD is very close to our clients' HR organizations, serving as an extension of their HR teams. We're focused on being forward-thinking and we're often involved in client HR and benefits-related technology decisions and strategies. It's natural that they would lean on us to help support their technology needs, especially in the benefits or integrated 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.






ADP: Can you talk about your role?

Coen: I oversee strategic planning, integration, and implementation of HRIS, Benefits Administration and Payroll systems for ABD clients. One of my main

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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®

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challenges is developing and implementing ABD's parallel client technology strategy — what systems ABD can support, how to support them, managing key vendor relationships, etc.

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 benefit carriers — is probably the single biggest pain point HR teams share with me. More and more, clients today are looking for an integrated HCM solution. And brokers are uniquely qualified to provide support and guidance. For me, as the technology leader within ABD, it's the first problem that I try to solve for a client who says, "I want to talk about my HR technology suite."

ADP: How have these challenges led you to ADP?

Coen: We've established a strong practice that focuses on strategic advising of clients that want help and guidance on the HCM technologies that are out there, because it's a complex, crowded space right now. It's a very exciting time for us. ADP has a very flexible, scalable solution that eliminates problems with integration and more. And that's just what we need in a partner.

Business solutions

ADP: Why did you partner with ADP?

Coen: We looked at which of our existing partners were investing in long-term partnership relationships. We chose to develop a relationship with ADP in early 2016 because they had rolled out tools and support teams to show their investment in partnering. ADP makes it easier for us as brokers to be the best advisors we can, and to support the technology our clients are using.

ADP: What value have you found in the partnership?

Coen: ADP offers brokers a "partner access" program, with trusted HCM consultants in areas such as the Affordable Care Act (ACA), general HR-related technology, and HR/Benefits strategies. With ADP, we have access to a dedicated team of senior professionals, and I'm very confident saying our team can find the answer to a question quickly.

The ADP Partner Access portal also offers excellent, unprecedented access to client data via a simple single sign on authorization, which means much less work for clients and much less stress for us too.

ADP: How has this relationship been received by your clients?

Coen: It was telling that as soon as we communicated that we had this new partnership arrangement with ADP, we had quick, positive responses from many clients. Some returned the release form [for Partner Access], giving us authorized access to support their account with ADP, back the same day. They 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.

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ADP: How does ADP address your clients' big pain points?

Coen: ABD clients that are interested in an HCM solution, like ADP offers, typically have suffered through the pain of systems that didn't communicate. As a result, they really want a solution that integrates out of the box. While there are point solutions, like benefits administration or HR applications, that do a fine job for one piece of the puzzle, the problem is the breakdown typically happens when there is a need for those pieces to effectively communicate with each other.

Movement of data has been very helpful and a key part of 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. And there is a strong return on investment with a fully integrated, one-stop shop solution. That's a primary reason for being with ADP.



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