

# Client Profile:

## CBIZ Benefits and Insurance Services Division, CBIZ Inc.



### FOUNDED

1996

### FOOTPRINT

50 US States  
+ 4 Territories

### CHALLENGE

Track & renew approximately  
15,000 licenses for  
1,000 individuals and  
280 entities

### SOLUTION

Migrate to Creative  
Compliance Hub

CBIZ (NYSE: CBZ) delivers top-level financial and benefits and insurance services to organizations of all sizes, as well as individual clients. They were ranked as a “Top 30 Largest Broker of US Business” by Business Insurance magazine in July 2023. Tony Carlock, Manager, Compliance & Licensing at CBIZ Benefits & Insurance Services Division, along with his team, Carolyn Wehner, Senior Licensing Coordinator, and Sue Foote, Senior Licensing Coordinator, manage all new licensing, renewals, new hire onboarding, changes of officers, address changes, DRPs, and more for the fast-growing brokerage.

For the past several years, the team had been using a license compliance solution from a large provider. As Carolyn observes, “The service was fine. Licenses went through, and overall, we were happy. We wanted better reporting capabilities – more canned reports and better report-writing tools we could use rather than paying them to write custom reports for us. And the interface – the look and feel of the product – it just felt very old.”

### Exploring Options

Still, there were no big problems or issues, just a few items that when combined, rose to a bothersome level. And, as Carolyn recalls, “Every five to eight years it’s good to see what else is out there, so we began to explore options.”

“We looked at several vendors,” Carolyn continues, “We saw demos, and follow up demos. We reviewed proposals and had internal discussions.” That’s a common process followed by many firms. Still, it can take some time from start to finish – in the nine to 12 months range for CBIZ, which is not uncommon for firms of their size.

**“Every five to eight years it’s good to see what else is out there.”**

-CAROLYN WEHNER, SENIOR LICENSING COORDINATOR

### What’s Working for the Licensing Team?

If “change” is good, “improved” is even better. Commenting on the Creative Compliance Hub user interface and workflow, Sue is enthusiastic, “I like the whole thing!” Then, she quickly adds, “And I really like the nightly NIPR

updates!" Carolyn immediately seconds that adding, "That's something we weren't getting before. We'd have to ask for it and we'd be charged."

Nightly updates from NIPR are included with Creative Compliance Hub. That ensures CBIZ starts every day with the most accurate and up to date data. With roughly 10,000 active licenses on Creative Compliance Hub, that eliminates a lot of time-consuming data entry and key-stroking errors, as well as the associated rejections, delays, redundant work, and stress.

**"I like that I can save my reports and then come back to tweak or modify them."**

- TONY CARLOCK, MANAGER, COMPLIANCE & LICENSING

The team also appreciates the reporting capabilities in Creative Compliance Hub, enjoying access to more canned reports and more robust custom report writing tools. Tony notes, "I like that I can save my reports and then come back to tweak or modify them. And if you can't figure something out, support is very responsive, very prompt (a sentiment that is shared by Carolyn and Sue). And it's usually something easy, so I can remember how to do it next time."

Support for Cost Centers to streamline and simplify expense allocation is another benefit Carolyn appreciates. "We have a cost center code attached to each producer so charges can be allocated appropriately. I just run a report, export the data, and send it to Accounting."

### **Conclusion: Explore Your Options, Take a Demo**

When you're among the largest brokerages in the US, switching license management platforms is a decision that can pay big dividends. By exploring their options, CBIZ was able to identify a solution that provides a better interface and workflow, nightly NIPR updates to improve data accuracy, improved reporting with more customization, and support for cost centers for optimized expense management. That's a big win for the CBIZ Compliance and License Management team and a good reason for anyone to schedule a demo of Creative Compliance Hub.

**We invite you to take a demo, too.**

**REQUEST A DEMO**



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