

Introduction and Onboarding to Catalyst: Unlocking Market Opportunities for Insurance Brokers

Welcome to Catalyst, your premier tool for navigating the dynamic landscape of insurance brokering with precision and foresight. As the insurance market continues to evolve, staying ahead requires not just hard work, but smart work—leveraging the right tools to uncover opportunities that can propel your business forward. Catalyst is designed to serve this exact purpose, offering a comprehensive suite of functionalities that empower insurance brokers to stay informed, connect, and capitalize on market movements and opportunities. Let's walk you through the essential features and guide you on how to make the most out of Catalyst from the moment you sign in.

Stay Ahead with Real-Time Job Change Alerts

In the fast-paced world of insurance, timing is everything. Catalyst keeps you one step ahead by providing immediate updates on key benefit buyer job changes right on the home page. Tracking promotions and job movements of benefits decision-makers not only helps you identify fresh opportunities but also keeps you informed about shifts within your existing client base. This feature ensures that you're always in the loop, ready to act when opportunities arise.

Discover Opportunities in Job Openings

Catalyst extends its tracking capabilities to job openings for crucial benefits buying roles at various companies. Knowing which employers are on the lookout for new talent gives you a unique advantage—an opportunity to recommend your services or share insights within your professional network. This proactive approach can set you apart in a competitive market.

Dive Deep with the Align Report

For those who seek a deeper understanding of job movements and market trends, the Align report is your go-to resource. Accessible from the top menu, this report offers an in-depth analysis, allowing you to strategize with comprehensive data at your fingertips. Whether it's spotting patterns or identifying long-term opportunities, the Align report equips you with the insights needed for informed decision-making.

Leverage the Latest Financial Insights

Understanding the financial health and plans of potential clients is crucial. Catalyst provides you with a list of the most recently filed 5500 forms in your area, offering valuable

insights into employer benefits plans and financial standings. This information can be instrumental in tailoring your pitches and proposals to match the needs and capacities of prospective clients.

Utilize Versatile Search Options

Catalyst's robust search functionalities allow you to explore the market from various angles. Whether you're looking to prospect new companies, connect with other brokers, or research carriers, Catalyst has you covered. With dedicated searches for employers, brokers, and carriers, you can navigate the market with precision, making informed decisions based on size, geography, market share, and more.

Getting Started

To begin your journey with Catalyst, simply sign in and explore the intuitive layout. The home page will immediately present you with the latest job change alerts and job openings. For more targeted searches, use the top menu or the left-hand side menu to access specific reports or search functionalities.

Remember, Catalyst is more than just a tool—it's your partner in uncovering the potential within the insurance market. By staying informed, connected, and proactive, you can harness the full power of Catalyst to not only meet but exceed your professional goals.

Welcome aboard, and here's to unlocking new opportunities together with Catalyst!