Book of Business Reports

Aggregate benchmarking across your full client base—perfect for mid-year reviews, prospecting, or internal performance metrics.

Benchmark Across Your Entire Client Base

Book of Business Reports allow you to step back from individual client analysis and view trends across your entire block. Whether you're preparing for mid-year reviews, planning prospecting campaigns, or evaluating how your firm stacks up across key metrics—these reports help you tell the bigger story.

What Is a Book of Business Report?

Unlike a standard benchmarking report built around a single employer, Book of Business Reports aggregate all (or a defined segment) of your firm's contributed plans into one dataset.

This allows you to:

- Analyze firmwide trends
- Identify strengths and gaps in your client portfolio
- Generate summary-level insights across industries, regions, and plan types
- Support marketing and business development

When to Use It

- **Mid-Year & Annual Reviews:** Show firm-level performance and areas for growth
- **Prospecting & Thought Leadership:** Highlight market intelligence unique to your book
- **Internal Planning:** Support resourcing, retention, and renewal strategies with real data
- **Carrier Strategy:** Evaluate book-wide plan designs, pricing, or funding strategies

How It Works

Book of Business Reports are available to partners contributing employer or plan data to Bnchmrk. Reports are generated instantly using the same structured dataset that powers employer-specific benchmarks.

You can segment by:

- **Industry**
- **Size**
- **Location**
- **Plan Type**

Results are exportable as PDF and suitable for sharing with leadership or prospects.

Access Requirements

- Platform license required (Essentials tier or higher)
- Data contribution required (manually, via upload, or API)
- Report can include all plans or a filtered segment

If your team isn't actively contributing data yet, reach out to get started.

Next Steps

Want help setting up your first Book of Business Report? Contact us at **support@bnchmrk.com** to learn how to activate data sharing and unlock this feature.

Questions about this guide? Contact our team at sales@bnchmrk.com or call (800) 215-2916