Custom Filters & Enterprise Use Cases

Tailor benchmarking with custom filters, data integrations, and support for complex client structures.

Enterprise-Grade Flexibility for Unique Needs

While Bnchmrk's standard filters cover most client needs, large firms and sophisticated users often need additional segmentation. That's where **custom filters** and **enterprise features** come in.

What Are Custom Filters?

Custom filters allow you to segment and benchmark based on fields unique to your dataset or business logic.

Common examples include:

- **Funding Type:** Self-Funded, Level-Funded, Fully-Insured
- **Union Status:** Union vs. Non-Union groups
- **Workforce Mix:** Remote, Onsite, Hybrid
- **Sub-Classifications:** Specialty subgroups within broad industries
- **Client Tags:** Internal groupings or account manager assignments

These filters are implemented during onboarding or via ongoing data contributions through API or structured uploads.

Who Uses Custom Filters?

Custom filters are ideal for:

- **Large Consulting Firms** with complex client segmentations
- **National Brokerages** managing thousands of plans across divisions
- **Data Teams** seeking tailored cohort analysis or internal KPIs
- **Enterprise HR Teams** with distinct business units or operating groups

Data Integration Options

Enterprise partners can pass filter values into Bnchmrk using:

- **Secure File Uploads**
- **Custom Excel Templates**
- **Direct API Integration**

Our team helps map your custom fields to the benchmarking engine so they're filterable in the UI and reflected in every report.

Use Cases

- **National Firm Roll-Ups:** Filter by internal region, team, or acquisition
- **Custom Reporting:** Tailor reports to match client-specific segmentation
- **Strategic Reviews:** Use consistent internal logic across benchmark cycles
- **Enhanced Internal Dashboards:** Overlay Bnchmrk data with your internal tools

Getting Started

Custom filters are available to Enterprise clients and Professional-tier partners by request.

Contact **support@bnchmrk.com** or your Customer Success lead to get started. Our team will scope your filters, handle implementation, and walk you through best practices for report building.

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