DropQuote

Master Training Guide

The complete guide to building RFPs, managing proposals, creating spreadsheets, and streamlining your workflow.

Table of Contents

1. Getting Started — Client Setup

Every RFP begins with creating a new client.

Create a New Client

- Click **"Create New Client"** and select **"New."**
- **Basic Information** — Client name, reason for market exploration, ben admin system, tech credits, enrollment type.
- **Group Details** — Location, SIC code, established year, lives, effective/release/due dates.
- **Broker & Commission Details** — Broker name, signing producer, commission percentages.

Tip: The Client List dashboard shows all RFPs with status: Current (building), Track (waiting), Spreadsheet (proposals uploading), Sold (marked sold).

2. Building the RFP — Current Products

For groups with existing coverage, build current plan designs at the "Current" step.

Option A: Prior Sold Proposal (Recommended)

The fastest method. Sold proposals contain all fields needed with minimal manual intervention.

- Select **YES** for current coverage. Upload the prior sold proposal(s). Supported: **.pdf, .docx, .doc, .txt**
- AI extracts all product details. Review at **"Edit Current Products."**
- Click the **magnifying glass** to verify where AI found its answer in the source document.

Tip: Sold proposals always produce the cleanest results. Use this method whenever possible.

Option B: Single Document Type per Product

- Upload one comprehensive document per product line. AI reads each individually.
- Review and fill fields showing **"not mentioned"** — benefit summaries often lack rate details.

Option C: Combination (Multiple Document Types)

- Upload a mix of documents. AI reads each independently.

Important: AI does not merge data from multiple documents for the same product. Duplicate plans must be merged manually in the Spreadsheet view.

Option D: Manual Entry

- Click **"Add current products,"** select products, and manually enter plan provisions.

Important: Do NOT upload census, experience, or utilization at this step. Attach supporting documents later at the Send step.

3. Virgin Groups (No Current Coverage)

• Select **NO** at current coverage. Select **YES** for additional plan designs. Add products and enter provisions.

Tip: If your office has "shelf plans" for first-time groups, DropQuote can pre-build them as templates. Contact your GIS office.

4. Renewal Rates & Additional Products

Renewal Rates

• Enter renewal rates at the **"Renewal"** step. Leave blank if not received. Click **"No Change"** for flat renewals.

Important: Do NOT upload renewal documents at the "Current" step. Enter rates manually at the Renewal step.

Additional Products & Alternate Plan Designs

The **"Additional"** step is where you request plan designs that differ from the group's current coverage. This is where brokers explore different options for their clients.

• Use this step to request **alternate plan designs** — for example, a higher or lower deductible dental plan, a richer vision plan, or a different benefit structure than what the group currently has.

• Add any **new product lines** the client wants to explore that they don't currently carry (e.g., adding Accident or Critical Illness coverage).

• Available products: Accident, Critical Illness, Dental, Hospital Indemnity, Life & AD&D, LTD, STD, Vol STD, Vision.

• Continue to **"Edit Products"** to enter the specific plan provisions you want carriers to quote.

Tip: This is the step where you shape what carriers will quote. If a broker wants to compare their current $1,000 dental max against a $1,500 option, add that alternate design here.

5. Sending the RFP

Select Carrier Contacts

• Choose contacts or click **"Create New Contact."** Add notes (size segment, assignments).

Attach & Send

• Attach supporting docs: **Census, Utilization, Renewals, Experience, Certs.**

• Review carriers and recipients. Preview the **"Proposal Request Form"** Excel file.

• Email is **auto-drafted**. Customize and click **"Send Email."**

Tip: Keep the default GIS language in the email to ensure GIS is listed as the GA.

Important: Avoid uploading census with PII. Best practice: never upload SSNs, names, phone numbers, or addresses.

6. Tracking Responses

• Blue **REQ** icons show requested products. Green **checkmarks** appear when proposals are uploaded.

- Click **DTQ** if a carrier declines to quote.

7. Building the Spreadsheet

- Upload proposals via **Track** → **Upload Proposals** or **View** → **Upload**. AI auto-fills the spreadsheet.

Important: Only upload proposals. Not flyers, network analyses, or disruption reports.

Color-Coded Highlighting

Color	Meaning
Green	Plan enhancement
Yellow	Not mentioned in proposal
Red	Less than current/requested

- Click the **magnifying glass** to verify where AI found each value.

8. Spreadsheet Best Practices

Set Globals (Critical)

- **Dental & Vision Enrollment Counts** — Required for premium calculations.
- **Basic Life / STD / LTD Volumes** — Must be consistent across carriers.

Important: Without enrollment counts and volumes, premium calculations will be inaccurate or missing.

Identify & Link Dual Option Plans

- For dual option dental/vision, **identify High vs. Low** via the three-dot column menu.
- **Link plans** to calculate combined premiums.

SUM Tab

- Click **"SUM"** tab. Check which plans to include in the Premium Summary.

Important: By default ALL plans are included. Uncheck unwanted plans or totals will be inflated.

Editing & Organization

- Make **all edits in Spreadsheet View first**. Presentation edits do NOT sync back.
- **Sort** via three-dot menu: by name (A-Z) or $ change from current.
- **Hide rows** with the eyeball icon. Blank rows auto-hide.

9. Creating the Presentation

- Click **"Create Presentation"** then **"Presentation Ready!"** to download.

Important: After spreadsheet changes, re-click "Create Presentation" and re-download.

Tip: To skip Protected View: **File** → **Options** → **Trust Center** → **Trust Center Settings** → **Protected View** → **Uncheck** the internet files box.

10. Marking the Case as Sold

This step is critical — it stores sold proposals for renewals and triggers implementation.

- Click the **three-dot menu** on the winning carrier → **"Mark as Sold"** for each product.
- Click the green **"Sold"** step. Confirm plans, notify parties, send the **implementation email**.

Important: If a proposal was updated since upload, delete the old version and upload the final sold proposal BEFORE marking as sold.

11. Renewals

- Find the group → **Actions** → **Create Renewal RFP**. Sold proposals auto-populate.
- Add updated census, dates, and renewal rates. Send to market.

Tip: This is why marking sold matters — it makes the next marketing cycle nearly effortless.

12. DropQuote + Employee Navigator Integration

A two-way connection: pull live census and plan data into RFPs, push sold plans back with a single click.

SETUP	IMPORT	QUOTE	EXPORT
Link client to Employee Navigator	Pull census + plans into DropQuote	Run RFP, compare proposals, pick winner	Push sold plans to Employee Navigator

Part 1 — Setting Up the Integration

- When creating a client, select **Employee Navigator** as the ben admin system.
  - Even if the client plans to use EN after marketing, select Yes.
- Complete setup. Select **Yes** for current coverage.
- At **"Integrate External Service,"** click **"Initiate integration with Employee Navigator."**

Part 2 — Completing the Link in Employee Navigator

- Log in to **Employee Navigator**. Go to **Integrations** → **Manage** under Pending Integrations.
- Find the DropQuote entry under **"Requires Your Action"** → click **Link**.
- **Link to existing company** or **Create New Company** (enter location + SIC code).
- Return to DropQuote → click **"Integration Has Been Completed in Employee Navigator."**

Part 3 — Importing Data

- **Import Plans:** Select **"Import all plans"** for current plan designs and benefits.
  - EN builds often lack all carrier quoting fields. Fill gaps at "Edit Current Products."
  - If using AI document extraction instead, select **"Do not import plans"** to avoid duplicates.
- **Import Census:** Select **"Import Census replacing any previous import."**
- Click **"Import Requested Data from Employee Navigator."**

Important: Importing plans AND uploading documents for the same group creates duplicate data. Choose one approach.

Part 4 — Sending with Live Census

- At the Send step, DropQuote **auto-attaches the live EN census** to carrier emails.
- Click **"Census Data"** under Attachments to preview what carriers will receive.

Part 5 — Exporting Sold Plans

- After marking sold, click the green **Sold** step.
- Select **"Export all sold plans"** → **"Export Requested Sold Plans to Employee Navigator."**

Part 6 — Finalizing in Employee Navigator

- In EN, go to **Benefits** → **Plan List**. Click the **incoming plan notification(s)** banner.
- Review each plan (carrier, type, rates), then click **Add**.

Tip: You'll still need to add eligibility rules and a few config details, but the export gets you most of the way there.

13. Other Functionalities & FAQs

Additional Features

- **Hide rows** — Eyeball icon. **Move carriers** — Hover for arrows. **Sort** — Three-dot menu. **Merge classes** — Three-dot menu.

Frequently Asked Questions

Q: My group disappeared!

Archives after 90 days. Click the **calendar button** on Clients Dashboard to extend search.

Q: Carrier sent a revised proposal?

Delete old (**View** → **Documents** → **Actions** → **Delete**) and upload new. Or upload alongside and delete duplicate columns.

Q: Custom spreadsheets?

Not yet. Submit feature requests for additional fields.

Q: What products are supported?

Dental, Vision, Basic Life, Vol Life, STD, vSTD, LTD, vLTD, Accident, Critical Illness, Hospital Indemnity. **Clarity** for HSA/FSA/COBRA. Partners for Legal, ID Protection, Pet Insurance.

Q: Medical quoting?

Coming later in 2026!

Q: What file types?

.pdf, .docx, .doc, .txt — No zip files.

Q: Who do I contact?

Local GIS offices first. They escalate to the **DropQuote support team** if needed.

For interactive walkthroughs, visit the **DropQuote Master Training** Arcade collection.