

Shortlister Cheat Sheet

Getting the most out of the platform — with real tips from your colleagues at Scott Insurance

What It Is

Shortlister gives instant access to vetted, up-to-date vendor intelligence across 290+ HR and benefits categories. In one platform, you can research and compare vendors, review in-depth vendor profiles, run Quick Quotes or full RFPs, and message vendors directly — no more email chains or scattered attachments.

- **Research & compare:** search 290+ categories, filter with custom flags, generate branded PowerPoint/PDF comparisons.
- **Vendor profiles:** minimum group size, competitors, ratings & reviews, marketing materials — plus private team notes never shared with vendors.
- **Quick Quotes & RFPs:** collect pricing and proposals from multiple vendors in one organized dashboard.
- **Direct messaging:** reach vendors from their profile and manage replies right from your email.

When to Reach for It

- A client mentions a vendor you don't know — pull their profile, pitch deck, and reviews in minutes.
- You need options for a new or unfamiliar benefit category (point solutions, BenAdmin systems, pet insurance, etc.).
- You don't have an existing "go-to" vendor source for something a client is asking about.
- You're building a shortlist and want ratings/reviews before you get on the phone with anyone.

Real Wins From the Field

"In less than 5 minutes I was able to locate their pitch deck and details about the vendor."

Nick Kammeyer, VP, Producer — on researching an unfamiliar COBRA/FSA vendor a client asked about

"It has definitely helped me find vendors much faster than a Google search."

Rebecca Zatyko, Procurement Specialist — whose Shortlister search surfaced Spot Pet Insurance, now a go-to option

"I'm able to direct Benefit Team members to the site for clients who don't meet HRP engagement criteria."

Megane Savage, Health Risk Performance Consultant — on time saved by pointing colleagues to Shortlister directly

"During meetings this week a client was talking about a new BenAdmin system — I knew immediately I'd go to Shortlister for research."

Gabrielle Turner, Account Manager — on making Shortlister the reflexive first stop

Getting Past the Learning Curve

Several team members said the same thing: Shortlister didn't click during onboarding, when it was one of many new tools thrown at once. It clicked the first time they had an actual client need and came back to it. If it didn't stick the first time, that's normal — the fix is simply to try it the next time a client asks about a vendor you don't already have a source for.

Advice From Colleagues Who Use It

- **Start with Vendor or Product Search.** It's the fastest way in — search by category or by name if a client already mentioned a vendor. (Megane Savage)
- **Be curious.** Look for creative solutions and ideas to serve clients even when there isn't an open request yet. (Nick Kammeyer)
- **Use it to vet, not just to find.** It's especially valuable for researching a new benefit administrator — what services they offer and how they're rated. (Gabrielle Turner)
- **Revisit training after you have a real use case.** Onboarding content is easy to lose in a flood of new-hire information; it's worth a refresher once you actually need it. (Rebecca Zatyko)