C2 SOLUTIONS | CONSULTANT CORNER

BenefitFlow

Prospecting and benefits market intelligence

WHAT IT IS

BenefitFlow helps producers and growth teams identify employer prospects, research their benefits, and connect with decision makers. It brings market intelligence, contact data, and AI research into one platform to support more focused business development.

THE PROBLEM IT HELPS SOLVE

Prospecting often means switching between databases, researching employers manually, and tracking down contacts. BenefitFlow combines these steps so teams can build targeted lists and prepare more relevant outreach.

HOW IT WORKS

- **Target employers.** Filter by headcount, location, industry, insurance products, and renewal dates.
- **Research the opportunity.** Review available coverage and plan information, employee sentiment, and benefits changes. Deep Research provides links to its underlying sources.
- **Reach the right people.** Find contact information for benefits managers, HR leaders, and executives.
- **Support your workflow.** Use native Salesforce or HubSpot integrations to enrich CRM records and keep information current.

VALUE FOR C2 MEMBER FIRMS

Supports a repeatable prospecting process: focus on employers that fit the firm's strengths, spend less time gathering background information, and use benefits insights to shape more relevant conversations. Best suited for producers, sales leaders, and business development teams.

WHEN TO USE IT

- Building a pipeline in a specific geography, industry, or employer size segment.
- Preparing for a prospect conversation or identifying potential benefits pain points.
- Planning outreach around renewals or changes in an employer's benefits offerings.

GET STARTED

Contact Lindsay Nelson at C2 to confirm your firm's access and available training. Current users can sign in and build a focused employer list for their next outreach campaign.

RESOURCES

Sign in

Broker overview

Training and help

Source: BenefitFlow website and broker overview • Reviewed November 2, 2026. Features and integrations may depend on your firm's subscription.