

- Banking
- **802** employees
- **60** locations

This bank had just completed a merger and had 2 separate benefit offerings to consolidate along with 2 separate benefit administration systems. They also were dealing with challenges working with UKG for their platform and data exchange. They needed a solution for benefit communication and enrollment along with a new enrollment platform, including integration to payroll and feeds to carriers.

**Challenge:** Education, Engagement, Enrollment & Administration.

### SOLUTION AND RESULTS



- Introduced Employee Navigator and setup integration to payroll and feeds to all carriers with ongoing eligibility management.
- Virtual app to allow employees to access communication, schedule and complete their consultation with a Benefit Counselor through an app.
- Support of 15 trained Benefit Counselors to assist with education and enrollment of 98% of the employees via a Call Center consult or screenshare meeting.
- Custom Communication and Engagement strategy including branded poster and postcards, custom videos, text and push communication. **Click on or scan the QR Codes to access poster**
- Setup of Benefit Counselors with limited Administrative access to assist employees with enrollment inside of the Employee Navigator platform to facilitate enrollment.
- Daily Reports showing employee ratings of Benefit Counselors to gain insight into the employee experience.

Poster



- **Voicemail: 725** of **802** successfully delivered
  - **SMS results: 90%** successfully delivered
  - **802** completed virtual consultations
  - Direct employee feedback from 323 employees:
    - **288** employees gave their Benefit Counselor 5 stars ★★★★★
    - **24** employees gave their Benefit Counselor 4 stars ★★★★
- \*Click on or scan the QR Code to access Benefit Counselor Ratings**

Ratings



### ENROLLMENT BY THE NUMBERS



#### VOLUNTARY BENEFITS

- Accident, Hospital & Critical Illness
- **631** enrolled employees



- **\$ 77,748** in Annual Premium
- **\$19,223** in Broker Commissions



#### WHOLE LIFE & CHRONIC CARE

- Permanent Whole Life
- **159** enrolled employees



- **\$147,106** in Annual Premium
- **\$52,958** in Broker Commissions

### TOOLS TO ENHANCE VALUE & SUBSIDIZE COST

#### ACTIVE ENROLLMENT

We define active enrollment as at least 75% of eligible employees completing enrollment with a Benefit Counselor. We can subsidize communication and enrollment platform for up to 2 years with voluntary benefits & active enrollment.

#### VOLUNTARY BENEFIT OFFERING

Introduction of 2-3 worksite or voluntary benefits to be offered.

#### WHOLE LIFE

Introduction of a whole life option for employees on a voluntary basis.