

- Public School District in WI
- 253 FT employees

This group is a public school district in Wisconsin that historically did all of their enrollments on paper and manually entered all changes into their carrier portals. The group wanted to transition to a benefits administration system with feeds to carriers, but did not have the budget to afford the implementation. In addition, the group wanted the deduction information to feed into payroll from the enrollment system and better education for employees around their benefits package. This required the build of a custom payroll feed to their school management software, Skyward, in addition to the build out of the benefits administration system.

Challenge: Education, Engagement, Enrollment & Administration.

SOLUTION AND RESULTS



- New App, Ep6enroll.app powered by Enrollify:
 - Voicemail allows direct communication from HR
 - Push & text communication (webinars & reminders)
 - Send links and videos
- ***Click on or scan the QR Codes to access video**
 - **Provide access to schedule virtual mtg w/ a Benefit Counselor**
- Enrollment Options
 - Call Center
 - Virtual Screenshare meeting
- Credentialed Benefit Counselors
- HR Reporting for access to enrollment completion & appt status
- Built custom integration between enrollment platform and client's payroll software

Video



- Voicemail: **143** of **151** successfully delivered
- **SMS results: 90%** successfully delivered
- **228** completed virtual consultations
- **222** completed w/ screenshare meetings
- Direct employee feedback from **85** employees:
 - **80** employees gave their Benefit Counselor 5 stars ★★★★★
 - **5** 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
- **89** enrolled employees



- **\$27,431** in Annual Premium
- **\$7,430.21** in Broker Commissions



WHOLE LIFE & CHRONIC CARE

- Permanent Whole Life
- **46** enrolled employees



- **\$17,196** in Annual Premium
- **\$6,190.56** 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.