

- Truck Sales, Service & Parts
- 19 locations in NY, NJ, CT
- 890 benefit eligible employees

Enrollment in prior years was completed by employees through ADP platform with limited engagement. In total, there were less than 50 employees who engaged in the platform enrollment with all others passively enrolling in the same benefits as the prior year. The limited engagement in the past also resulted in very low adoption of a recent HSA medical plan option, with only 14 employees enrolled. The client and broker partnered with Ep6ix to provide a full scale pre-communication plan, supported with onsite and call center Benefit Counselors to facilitate education of the core benefits including: a new wellness program, nurse advocate program and a new voluntary benefit program featuring accident, critical illness and whole life options.


**Challenge:** Client needed improved engagement to help improve benefit enrollment in the HSA medical plan along with an overall increase in benefit awareness and understanding.

### SOLUTION AND RESULTS



- Provided a full scale communication campaign consisting of digital and print communication via text, email, video, posters and postcards.
- Trained and prepared 13 Ep6ix Benefit Counselors to support core enrollment within ADP.
- Benefit Counselors supported onsite enrollment at all 19 locations, with call center as a backup.
- Utilized ep6enroll.app for communication and case management including Benefit Counselor rating reports and daily "Scheduled", "Completed", and "Not Yet Scheduled" reports to the client.
- Supported build out and testing of critical illness and accident on ADP platform.
- Provided enrollment platform for whole life option with feed to ADP for deduction setup.



- **400** employees completed enrollment with a Benefit Counselor
- **97%** approval rating of Benefit Counselor by employees 
- **93%** of text messages successfully delivered to employees

### ENROLLMENT BY THE NUMBERS *"HR indicated that enrollment increased 10x over the prior year"*



#### VOLUNTARY BENEFITS

- Accident and Critical Illness
- **140** enrolled employees



- **\$ 58,979** in Annual Premium
- **\$ 12,661** in Broker Comp



#### WHOLE LIFE & CHRONIC CARE

- MassMutual Whole Life
- **142** enrolled employees



- **\$ 134,184** in Annual Premium
- **\$ 53,673** in Broker Comp

### TOOLS TO ENHANCE VALUE & SUBSIDIZE COST

#### ACTIVE ENROLLMENT

Active enrollment helped to drive engagement along with Benefit Counselor support both onsite and through call center.

#### VOLUNTARY BENEFIT OFFERING

Introduction of two new worksite, voluntary benefits to enhance the current core benefit offering

#### WHOLE LIFE

Introduction of a permanent whole life coverage to complement the voluntary term life offered through the employer with additional benefits for chronic care for long-term care related conditions.