



CASE STUDY

COMMUNICATION AND ENROLLMENT



- Non-profit school for developmentally disabled
- 3 locations all New York
- 500 total employees with 155 on benefits

Tiegerman School was an existing Aflac traditional case with approximately \$10,000 in force AP with 20 policies. The annual new premium for the group was \$2,160 in 2023. Client has been on Employee Navigator provided by the broker and Aflac had not been integrated into EN. The client engaged the broker to assist with Aflac as some servicing concerns arose. The broker engaged Ep6ix for education and communication planning. During discovery, we learned that of the 3 medical plans offered (low, mid, and high), the broker and client agreed that from a financial perspective, no one was benefiting from being in the mid plan. The low plan would allow for over \$2,132 for a single and \$6,370 per family in savings with no additional out-of-pocket, but HR struggled to get adoption.

Challenge: Client needed a platform solution last minute and education of benefits alongside carrier and plan design changes for the medical, ancillary and voluntary benefits.

SOLUTION AND RESULTS



- Assisted employees with a complete review of benefits offered
- Trained and prepared 3 certified benefit counselors to support enrollment and education using Ep6enroll.app for scheduling appointments, screenshare meetings and call center consultations
- Utilized Ep6enroll.app for communications including voicemail, video, text messaging and email. ***Click on or scan the QR Codes to access poster and video**
- Built and deployed a custom client branded communication plan including video, html emails and posters
- Provided weekly cadence call with HR throughout the process and daily reporting of enrollment and scheduling results

Poster



Video



- **100%** of benefit eligible employees completed enrollment with a counselor *
- **97%** 5-star ratings for counselors ★★★★★ ***Click on or scan the QR Code to access Benefit Counselor Ratings**
- Over 60 hours of benefit consultations with 3 counselors over 3 weeks
- ***34 employees that were on the mid plan were moved to the low plan resulting in client savings of approximately \$84,000 for their overall renewal.**

Ratings



ENROLLMENT BY THE NUMBERS



VOLUNTARY BENEFITS

- Cancer, Accident, Hospital and Short-Term Disability
- **80** enrolled totaling **145** new Aflac policies



- **\$91,386.72** in Annual Premium
- **\$21,419.43** in Broker Commission

TOOLS TO ENHANCE VALUE & SUBSIDIZE COST

ACTIVE ENROLLMENT

Active enrollment requires all benefit eligible employees to make elections of their benefits for the current year. These enrollments were supported with a Benefit Counselor option or through self-enrollment on the Employee Navigator platform.

VOLUNTARY BENEFIT OFFERING

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