

Case Study

CASE PROFILE

Industry: HVAC, Electrical & Plumbing
Locations: OH
Employees: 310
Completed: 262 (85%)

BACKGROUND

- ▶ Client was using an enrollment platform provided by the prior ancillary carrier
- ▶ The Worksite Group implemented a new, carrier agnostic, benefits administration system
- ▶ EDI connection established between the new system, carriers, and payroll
- ▶ The Worksite Group collaborated with the client to create a new benefit guide
- ▶ Pre-Enrollment text campaign was delivered to all employees
- ▶ Online Scheduler was utilized for employees to book appointments
- ▶ Employees enrolled exclusively via call center with benefit counselors
- ▶ Turnaround time from the initial client call to the start of open enrollment was 3 weeks
- ▶ New Hires have the option to self enroll in the system or via call center

RESULTS

	Prior Carrier		New Carrier		Difference in Enrollment	
	# Enrolled	%	# Enrolled	%	# Enrolled	% Increase
Dental	129	42%	189	61%	60	47%
Vision	118	38%	179	58%	61	52%
Supp Life	70	23%	136	44%	66	94%
LTD	46	15%	125	40%	79	172%
STD	62	20%	141	45%	79	127%
CI	0	0%	113	36%	113	
ACC	0	0%	117	38%	117	

*Participation yielded an increase of \$70,197.72 in annual premium despite savings for employees across each line of coverage.

*Compensation split was on Acc & CI only. Broker retained 100% compensation on all other lines

The Bottom Line

- ▶ Employees have an increased understanding about their benefits through a 1:1 consultation
- ▶ Client received a carrier agnostic benefits administration system for ease of administration
- ▶ Broker received a compensation increase across all ancillary lines of coverage

Case Study

CASE PROFILE

Industry: Transportation
Employees: 2,242
Locations: 19 (Primarily in CA, IL, GA, OH)
Voluntary: Accident, Critical Illness,
Products: Hospital, and Term Life

BACKGROUND

- ▶ Company previously administered benefits via paper. The Worksite Group implemented a benefits administration system with EDI and API connections to each carrier.
- ▶ Conducted 1:1 employee benefit meetings, utilizing onsite benefit counselors and call center.
- ▶ Meetings were completed across all 3 shifts of a 24-hour schedule within a 2-week window.
- ▶ 91% of benefit eligible employees were completed by benefit counselors
- ▶ The Worksite Group collaborated with the client to create an employee benefits guide, informational flyers, and conducted a text campaign to employees.
- ▶ Scheduling for employee appointments were booked via an online scheduler
- ▶ Benefit Counselors assisted with loading dependent eligibility documents into system
- ▶ New Hires can enroll via call center or self-enroll in the benefits administration system

RESULTS

	Accident	Critical Illness	Hospital	Term Life	Total
Premium	\$297,957.84	\$293,730.60	\$294,389.16	\$382,136.04	\$1,268,213.64
Participation	71%	44%	54%	66%	90%*

*90% of employees enrolled in at least one voluntary plan

CLIENT TESTIMONIAL

"Upon engaging The Worksite Group as our enrollment firm partner, we were impressed with the quick turnaround from implementation to launch. TWG was professional while being responsive and showing flexibility to meet our specific needs and the dynamics of our industry. We highly recommend their services." – Director of Human Resources

Case Study

CASE PROFILE

Industry: Manufacturing

Employees: 471

Locations: Indiana & Michigan

Voluntary Short Term Disability, Long Term Disability,

Products: Accident, Critical Illness, Hospital,
Term & Permanent Life

BACKGROUND

- ▶ The Worksite Group became involved at the last minute, just 3 days prior to open enrollment
- ▶ Within 48 hours, 95% of benefit eligible employees were scheduled for individual appointment times the following week
- ▶ All appointments, including inbound and outbound calls, were managed via The Worksite Group's call center with mobile and online scheduling
- ▶ Utilized existing core benefits platform for enrollment
- ▶ New hires are enrolled via call center each month

RESULTS



- ▶ 7 new voluntary lines of coverage were offered through 2 different carriers. The Worksite Group built the new voluntary lines into a separate enrollment platform in 48 hours because the client's existing platform was not able to host the new voluntary lines in time.



- ▶ All eligible employees were enrolled within 7 business days. Scheduling began only 3 business days before open enrollment began.



- ▶ Following enrollment, The Worksite Group assisted the broker's office with conducting an audit of results and delivering all files to the carriers and client.



- ▶ Client reported positive feedback from HR and employees. HR burden was reduced by eliminating paper and increasing employee education.

Case Study

CASE PROFILE

Industry: Manufacturing
Employees: 405
Locations: 4 in NE Ohio

Voluntary Short Term Disability, Accident,
Products: Critical Illness, Term & Permanent Life

BACKGROUND

- ▶ Consolidated ancillary & worksite lines to 1 carrier
- ▶ Client had a poor experience previously with a worksite carrier's enrollers
- ▶ Benefit Administration System built & serviced by The Worksite Group at no cost to the client
- ▶ Benefit Counselors met face-to-face with all 405 employees in 20-minute increments
- ▶ Broker & client felt that the experience for employees was educational and low pressure
- ▶ New hires are enrolled via call center each month

RESULTS

	Buy-Up STD	Term Life	Perm Life	Accident	Critical Illness	Total
Premium	\$62,378	\$74,387	\$57,857	\$60,653	\$63,158	\$318,433
Participation	49%	46%	23%	56%	33%	78%*

*78% of employees enrolled in at least 1 voluntary plan

The Bottom Line

Benefit to the employee

- ▶ Better understanding of benefits through individual consultation with a salaried benefit counselor
- ▶ Printed confirmation page to confirm elections, waivers & deductions
- ▶ Updated beneficiary information

Benefit to the client

- ▶ Reduced workload on HR during open enrollment & new hire onboarding
- ▶ Streamlined administration by consolidating carriers & implementing benefits administration system

Benefit to the broker

- ▶ Reduced workload during open enrollment
- ▶ Increased compensation from voluntary benefits participation
- ▶ Increased satisfaction & retention with client

Interested in working with us?
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Case Studies



CASE PROFILE

Industry: Municipality
Employees: 2,000
Location: Ohio

Voluntary Products: Short Term Disability, Accident, Critical Illness & Whole Life

BACKGROUND

- Consolidated individual worksite products from 2 carriers to group products with 1 carrier
- Worked side-by-side with the broker on the RFP Process
- Leveraged carrier & technology relationships to provide benefits administration system to the client at no cost
- Assisted HR with group meetings with each department prior to one-on-one meetings
- Coordinated one-on-one schedules with each department for staff to meet with benefit counselors

RESULTS

	STD	Whole Life	Accident	Critical Illness	Total
Participation Increase	41%	148%	298%	528%	215%*

*215% increase in participation across all lines of voluntary coverage



CASE PROFILE

Industry: Transportation
Employees: 285
Locations: 4 (Illinois, Indiana, Texas)

Voluntary Products: Short Term Disability, Accident, Critical Illness, Hospital & Term Life

BACKGROUND

- Consolidated ancillary & worksite coverage from multiple carriers to one carrier
- Low participation and poor service from prior worksite carrier
- Benefit Counselors met with onsite employees face-to-face
- Drivers were enrolled via call center (both inbound & outbound calls)

RESULTS

	STD	Term Life	Accident	Hospital	Critical Illness	Total
Premium	\$127,242	\$104,570	\$39,934	\$55,722	\$19,853	\$347,321
Participation	67%	65%	45%	49%	17%	86%*

*86% of employees enrolled in at least 1 voluntary plan