

Benefits Insights Dashboards Guide

This document highlights key dashboard visuals/slicers that answer common questions about your members' enrollment and support experiences. It focuses on the **most actionable insights** —ones that can guide decision-making, reveal engagement trends, and support benefit communication strategies. Each row in the table represents a specific visual or slicer and outlines how to interpret it, what it means for HR strategy, and where it fits in the overall member experience. **Use this guide to connect data to decisions and focus your team's attention on the insights that matter most.**

Dashboard Name	Tile/KPI/Slicer	What Question Can Abby Answer?	HR Efficiency	HR Trend Mgmt.	Enrollment Impact
Name of dashboard	Name of visual/slicer	The practical, real-world question this data helps you explore or solve.	How the metric helps optimize service delivery, staffing, or resource allocation.	How it tracks performance or sentiment over time and flags emerging patterns.	Shows which part(s) of the member journey the data touches — before, during, or after enrollment.

Dashboard	Tile/KPI/Slicer	What Question Can Abby Answer?	HR Efficiency	HR Trend Mgmt.	Enrollment Impact
Service Center Trends & Performance	Calls (Total)	How many members reached out for support during this period?	Tracks volume to monitor support operations scale	Identifies seasonal or campaign-related spikes	Helps size awareness and education support; evaluate success at enrollment; monitor service needs after benefit use
	Case Resolution Rate	Are we resolving member issues quickly?	Measures on service-resolution speed/benchmark	Faster resolution reduces friction and pain	Helps evaluate member success at enrollment and reduce post-enroll confusion; validates how issues are handled after benefit use
	Repeat Caller Rate	Are members getting their issue resolved the first time?	Tracks potential system problems or comms gaps	Flags systemic issues or policy areas with recurring problems	Could indicate gaps in content or tools before enrolling; may signal poor support during enrollment; key to preventing post-enrollment issues
	NPS (Net Promoter Score)	Are members likely to recommend our benefits experience?	Measures loyalty and satisfaction	Longitudinally helps track sentiment shifts post-events	Tied to how enrollment was experienced; reinforces lasting sentiment after resolution; reflects post-enrollment confidence
	CES (Customer Effort Score)	How easy was the experience for members?	Indicates UX/service ease - critical to performance	Helps identify high-friction points	Tied to how enrollment was experienced; reinforces lasting sentiment after resolution; reflects post-enrollment confidence
Enrollment Experience Survey	Survey Question: Overall Experience	What were members overall satisfaction with the enrollment experience?	Reflects impact of tools/processes holistically	Baseline for tracking improvements over time	Signals readiness or confusion before enrolling; captures entire journey effectiveness; synthesizes post-enroll feedback and lasting impression
	Survey Question: Decision Confidence	Do members feel confident in their choices?	Measures effectiveness of education tools	Helps track year-over-year improvements	Validates education delivery; informs coaching or decision aid design; connects to retention confidence
	Survey Question: Ease of Process	Was it easy for members to enroll?	Indicates UX quality	Helps track year-over-year improvements	Validates pre-enroll readiness; critical to capturing intent at enrollment; reveals confusion in the final step
	Survey Question: Understanding of Benefits	Do members understand their benefits?	Measures effectiveness of education tools	Supports year-over-year education improvements	Validates education effectiveness; helps refine benefit presentation; reinforces communication strategy
	View by Demographic	How do experiences differ across employee segments?	Helps pinpoint gaps by employee segment	Identifies trends by generation or tenure	Improves targeting for education; informs segment-specific improvements; supports personalized follow-up