
HR's New Engagement Equation



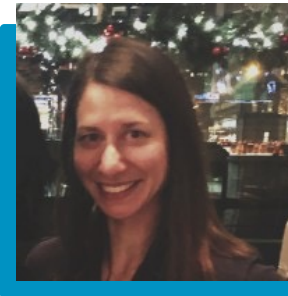
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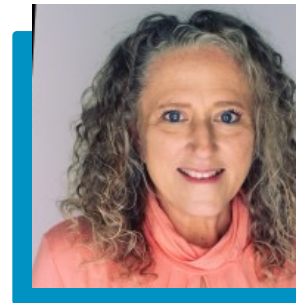
Meet the Speakers



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Supporting Employees with Benefits of Choice



»»» Benefit Perspectives are Shifting

Consumer expectations and needs have evolved:

- Gen Z is poised to make up **27% of the workforce** by 2025.
- **58% of employers** say their organization needs better resources to help employees understand their benefits
- **33% of workers** don't understand the supplemental benefits offered to them; **84%** don't understand benefits at all



What today's benefit shelf looks like:

Health	Security	Benefit Programs	Workplace Culture
<ul style="list-style-type: none">• Medical• Dental• Vision	<ul style="list-style-type: none">• Life insurance• Disability• Consumer spending accounts• 401(k)	<ul style="list-style-type: none">• Telehealth• Emotional support• Care navigation• Family planning	<ul style="list-style-type: none">• Work environments• Professional development• DEI

Sources: The Hartford's 2022 Future of Benefits Survey



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»»» Driving Superior Enrollment Strategies



- Connect your benefits to your employees' unique needs
- Communicate the value of those benefits before the moment of enrollment
- Decision support to help connect the dots at the moment they enroll

When the employee benefits experience is personalized...

80% feel confident in their benefits choices, despite 84% saying they're confused about benefits

67% elected an HDHP with an HSA with personalized decision support



Athletico:

- **66%** of employees used personalized decision support to guide them through enrollment
- **78%** logged in during a passive enrollment to review or update their benefits



Waste Pro:

- **75%** of employees who used personalized decision support selected the recommended plan offering
- **70%** logged in during a passive enrollment to review or update their benefits





HR's New Model



Personalization Drives Meaningful Engagement



Omnichannel Communication



Targeted, Relevant Awareness



Removing Barriers to Activation

- **2X** increase in engagement when personalization is present in and outside of the platform
- **19%** increase in right-time, right-benefits engagement with personalized reminders or nudges



Athletico:

- **51%** logged in 4 or more times after enrollment with the help of personalized email and text reminders
- **37%** average email open rate for personalized benefits reminders



Waste Pro:

- **20%** increase in benefits or resource engagement with personalized reminders and nudges
- **31%** unique engagement (click or call) rate when members see personalized reminders in the platform



»»» Sofia Supercharges the Member Experience

Employee self-service soars as AI supports personalization and empathy in benefits.



- **82%** of Sofia interactions stay resolved after 7 days
- **33%** of Sofia interactions were on nights/weekends



Athletico:

- **82%** of employees' virtual assistant chats stayed resolved after 7 days
- **38%** of all calls were supported by Sofia
- **32%** of Sofia interactions were on nights/weekends



Waste Pro:

- **80%** of employees' virtual assistant chats stayed resolved after 7 days
- **26%** of all calls were supported by Sofia
- **41%** of Sofia interactions were on nights/weekends



»»» Humans Drive Empathetic Experiences



Technology designed around people, making it easier to understand and navigate

AI supporting efficiencies so your people get more empathetic and attentive service

- **72** overall member services NPS rating—in the “Excellent” range
- **4 out of 5** overall positive sentiment when members call in for support because advocate is fully focused on them when AI is supporting in the background



Athletico:

- **Refreshed their platform design** with user-friendly layouts to make it **easier for members** to navigate their benefits
- **4 out of 5** overall positive experience when members called in for support and spoke with a live advocate



Waste Pro:

- **80%** positive sentiment when members needed to speak with a live advocate for support
- **Dependent audit** led to employees calling in to ensure their family had coverage, resulting in **confusion turning into relief** after speaking to a live advocate





**Personalization +
Empathetic AI +
Humans =
HR's New Model**



»»» HR's New Model for Employee Engagement



Evaluate benefits technology looking at how it uses AI and personalization to drive efficiencies, engagement, and self-service

- Does the technology support a one-stop experience?
- How is AI used in your benefits platform? What outcomes does it support?
- How does your benefits technology personalize the end-to-end experience for your population?
- Is decision support embedded within the enrollment experience? How effective is it at guiding members towards right-fit benefits?
- What communication tools are in place to reach members outside of the platform?



Thank you.

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