

Case Study: Technology Delivers Added Value to Broker's Wrap Around Services

Overview

The broker in this case study offers most conventional services of a benefits insurance brokerage. However, their unconventional consulting services are where they have made their mark—and leveraging PlanSource technology simplified the evidence of insurability tasks, as well as other critical processes on behalf of their customer.



Industry: Hospitality



Employees: 160



Location: 7 properties



“PlanSource gives access to all the information I need to provide the services our customer has come to expect. Administrative tasks have been greatly reduced so I can spend more time on other needs and goals on behalf of my customer. Guardian and PlanSource’s Evidence of Insurability (EOI) API, removed the burden to have to manually review, collect and track EOI forms. This resulted in a positive open enrollment experience.”

– Senior Account Manager

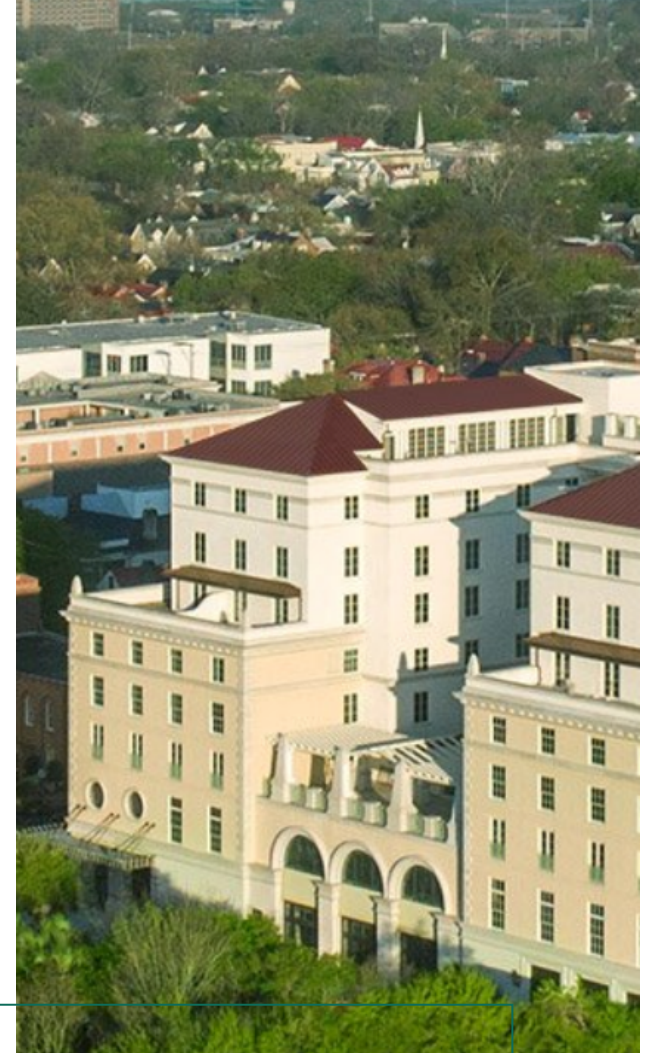
Challenge

- Organizing and navigating 7 properties' benefits information by location and by plan on behalf of the customer
- Reviewing and tracking down Evidence of Insurability (EOI) forms distracted HR from other, important customer activities
- Communicating the results of each EOI was a daunting and time-consuming activity that consumed much of HR's time

Solution

Benefits management is no easy task and without PlanSource, the broker was spending an absorbent amount of time on tedious tasks that were managed by paper. The Account Manager now leverages the PlanSource platform to automate tasks, ensure accuracy of benefits information and enrollment and manage EOI forms as well.

- **Single Sign-on:** APIs with Guardian's Evidence of Insurability forms made it easy for employees to fill out the medical questions while also alleviating the need for an intermediary—such as the Account Manager or HR Director—from being involved.
- **Automated Decision Notification:** Guardian's EOI decision notification integration eliminated the unnecessary admin work of tracking down employee's EOI decisions and communicating them out. Now the employees know instantaneously whether they were approved or not.
- **Open Enrollment Convenience:** PlanSource technology delivered overall OE convenience to the broker through allocating plenty of time for testing and managing benefits.



Results



15 minutes saved per employee that completed EOI with Guardian's Single Sign-on integration



1.5 hours saved each week from tracking and reporting automations



24 hours of admin work saved due to Guardian's automated decision notification process



Increased customer satisfaction with their benefits through the use of PlanSource's technology

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