



**450 employees across South
Carolina**

**Sales reps in multiple
locations**

**Constant influx of new
employees**

Executive Summary

- The HR team believed in voluntary benefits and one-on-one enrollment
- Didn't have the right team in place to implement these systems in a timely manner
- Found the previous firm they worked with to be inflexible, slow and unable to keep up with the demands of recurring monthly enrollments
- When the time came to evaluate alternative enrollment and benefit communications options, they jumped on it and chose Palmetto Broker Partners

Challenges

- The company was purchased by private equity and the benefits needed to be changed to the sponsor within 30 days
- Plan changes needed to be communicated to the workforce within two weeks of the acquisition
- The target was manufacturing company where employees cannot spend time away from their stations
- The previous enrollment firm would not assist because there was not enough revenue generated the previous year, so our broker partner contacted our firm to assist



How Our Products & Services Helped

- The broker partnered with our team to assist with the annual enrollment as well as the vital one-on-one meetings with each new hire throughout the year
- We enrolled each employee in their core benefits which consisted of:
 - 3 health options, dental, vision, STD, LTD, VGTL,
 - as well as Colonial Life Voluntary products
- All 450 employees were seen, enrolled promptly and had their biometric testing completed within 72 hours

Results, Return on Investment and Future Plans

- Within 10 days of getting the green light from our broker partner, we built a benefits platform and coordinated a communication strategy with the client and broker
- We had six benefits counselors on site working 12 hour shifts in order to enroll all 450 employees in three days
- Enrollment was completed and files were distributed to the carriers with one week left on our initial timeline
- We continued to enroll new hires on the 15th of the month for the next two years
- This freed up HR's ability to do the tasks that they needed to do rather than educating and enrolling new hires on their benefits package

Our enrollment provided an increase in core participation as well as \$29,000 in worksite commissions for our broker partner