



**10 offices across South Carolina
and Georgia**

75 to 200 employees per office

3 plan options

Executive Summary

- The HR team didn't have time to communicate the strategy to all 10 offices across multiple states while still being able to effectively enroll the participants in a timely manner during the open enrollment window
- Since each office needed an individually customized cost containment strategy, it was imperative for whomever the HR team partnered with to have effective communication systems in place to accurately execute the planning and enrollment options
- In 2012, after carefully weighing their options, they decided to go with our team, Palmetto Broker Partners
- Since then, the company has realized not only a soundly communicated benefits plan but also an increase in revenue of 7.5%

Challenges

- The HR team had to communicate a steep medical increase during open enrollment to 10 separate practices across 2 states
- Because of the increases, the employer wanted to offer a cost containment strategy to offset the difference
- Due to the large number of individuals within each practice, the HR team did not have time to communicate the strategy to all locations while effectively enrolling the participants in a timely manner during the open enrollment window



How Our Products & Services Helped

- For the 7th consecutive year, the HR team has asked our team to assist in communicating the renewal increase and implement a cost containment strategy
- For this purpose, we used a Colonial Life Voluntary Product that alleviated much of that increase
- Our team conducted a strategic meeting with the owner of each location individually to develop a strategy that was a fit
- From there, our team enrolled each location by conducting brief group meetings at each location, followed by a one-on-one enrollment session with each employee, to ensure that they had selected the correct plan for their needs as well as voluntary products that filled in their gaps in coverage

Results, Return on Investment and Future Plans

- The client immediately realized a 25% lift in voluntary benefit participation
- The employer also reaped the benefits of a more appreciative workforce after having their benefits properly explained while also enrolling in the coverage that most appropriately addressed their bottom line
- We continue to provide award winning service and maintain our partnership with this company and hope to have yet another record setting year for their organization