



Problem

- Broker's client acquired 11 separate companies with locations spread across four states and intended to put all under one benefits point
- Enrollments previously done on three separate systems among target companies
- The broker came to Palmetto Broker Partners looking for a single-source solution for communication and enrollment across all companies and locations
- We were given a time table of less than 35 days to accomplish this

Solution

- Set up Employee Navigator and built out core offerings in-house to have uniform/single-source enrollment elections for 2018 and 2019
- Deployed benefits counselors to each location to conduct face-to-face enrollments with every employee to educate them on the new plan offerings and explain how they differed from coverages prior to the acquisition
- The client continued to make acquisitions throughout 2019 and we assisted with on-site enrollment in each instance, regardless of location. For every acquisition, we sent an enrollment team to assist with the transition from old to new plans.



The Client Received:

- Implementation support
- Additional resources for open enrollment and company acquisitions
- Benadmin system to house all elections and better manage the benefits offering
- Ongoing management and support of the benadmin system
- Enhanced benefit offering through worksite benefits at no cost to company

The Broker Received:

- Implementation support
- Full buildout of pre/post enrollment communications campaign
- Carrier file buildouts
- Daily updates and enrollment progress reports
- High participation on medical and core plans
- Additional \$90,000 in commission revenue from worksite products