

Team Spotlight

Employee Benefits » **Analyst Team**

September 2024

Ready to embark on an adventure beyond the 3 "C"s? We're getting to know our analyst team! These talented specialists dive deep into data, uncover trends, and craft strategies that keep our clients' benefits programs running smoothly. They're the ones who make sure everything adds up, from projections to cost-sharing, and they're always ready with a solution. In this spotlight, get to know the faces behind the numbers, learn how to best collaborate with them as we gear up for the busy 1/1 season, and discover the exciting new developments within their team.

Get to Know the Analysts

Over the last year, we've added a lot of horsepower to the analytics team. Max Muehring joined the team at the start of 2024, Luke Biocic started in June, and Eric Brannon recently accepted a full-time offer for June 2025. Eric will work part-time throughout his last year at SDSU. With these new teammates, we've expanded our capacity, allowing us to take on new and exciting projects and expand support across the spectrum of work the team has always done.



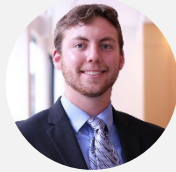
Parker Scott, *Dubuque*



Reese Vanderheyden, *Dubuque*



Dan Feldhake, *Dubuque*



Max Muehring, *Remote*



Luke Strub, *Dubuque*



Luke Biocic, *Dubuque*



Jordan McFeggan, *Madison*



Eric Brannon, *Dubuque*

Team Projects and Progress

- Jordan and Max are assisting Dan with prospecting and merger and acquisition activity across all regions. With the additional hands, we are expanding prospecting support to all producers and are working to standardize how we engage prospecting requests for consistency in work product and deliverables.
- Luke Strub is spearheading major tool improvements with the release of the SAM Toolkit, 3C's, and Self-Funding Budget Calculator this year. The Coverage Toolkit and HRA Cost Estimator, among others, are next on the list of enhancements to come in the near future.
- Luke Biocic is improving our internal Power BI reporting, such as the Consultant Dashboard, and leading efforts to build additional internal reports to provide instantaneous and up-to-date reporting on various parts of the business.
- Jordan and Reese are re-working our 1095/1094 reporting business to both operate more efficiently and grow our top line revenue.
- Eric is updating and improving the Rx Metrics project which the Pharmacy team uses to assess client and PBM performance.
- The entire team is evaluating and implementing various process improvements or new technology such as:
 - Claros actuarial software
 - Improvements to our agency management system, Salesforce, and BA workflows
 - Capturing improved efficiency through Microsoft copilot and other AI software
 - Network discount analysis, care navigation, and cost transparency tool

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Things to know for 1/1

1

Engaging the Analytics Team

The best way to engage the analytics team for client or prospect support is through our Monday.com request form. You can find the request form link on the "Monday.com Best Practices" board or the intranet.

2

Submitting Detailed Requests

When submitting a request, include as much detail as possible about your needs and the client or prospect's situation and goals. Common 4th quarter requests include: self-funded budgeting assistance, plan design and contribution modeling, and help with high costs, difficult renewals, and strategy planning. Feel free to reach out for any assistance you need.

3

Review and Turnaround Time

The analysts aim to review and assign each request within 1 business day, with a target average turnaround time of 3 business days from submission. Complete requests with all necessary data help us immensely. Longer turnaround times will be communicated ahead of time.

4

Urgent Requests

If you need a request turned around the same day or next day, submit it via Monday.com and follow up with an email or phone call to the team.

5

Communication and Efficiency

Clear communication and providing all necessary data upfront help ensure efficient processing of your requests.

