Engagement Team

Content provided by the Non-Medical Marketing, Communications, and Technology Teams.

Non-Medical Marketing:

Hi Team, it's March! We made it past 1/1 but are still dealing with the past 1/1 and getting ready for the next. Here are reminders of things to think about.

- **1/1/26 carrier and plan changes contract checks –** The marketer does not receive the contacts from the carrier. Note Krista is sometimes CC'd on emails from carriers as the signing Broker but does not forward those emails (there are a TON of them). If you need checks completed, please send the contract to the marketer. Also, please try to refrain from saving contracts to the O drive that are not confirmed correct. Keep in mind contract checks on multiple lines of coverage with many classes and documents that may be 80 pages long takes some time.
- **National Accounts –** we created a National Account Stewardship framework last year which requires annual experience updates from the carriers. Now is the time to ask the carriers for those reports, if you have not already. If you have questions about how to understand the reports, please connect with Krista or Stephen.
- **1/1/27 renewals for Large and National Accounts –** it's not too early to start. You can request renewals from carriers and may be able to get some by mid-summer, earlier for larger accounts. Getting aligned with clients on objectives by the start of Q3 or earlier is ideal.
- **Leave Outsourcing –** start those conversations now! For 1/1 effective dates, implementation needs to start by September. National accounts should start RFP's by April.

Top Carrier Partners

2025 Top 5

1. Sun Life
2. MetLife
3. Symetra
4. Mutual of Omaha
5. Unum

2026 Top 5 (So Far)

1. MetLife
2. Symetra
3. Mutual of Omaha
4. Sun Life
5. Unum

Note: drop from Sun Life due to service issues.

Communication Team:

2025 Recap

The Communication Team wanted to take a moment to celebrate all that was accomplished in 2025. Here are just a few highlights by the numbers:

- 1,500+ projects completed (avg. 376/teammate)
- 3,500+ items created
- 164 outdated guides updated to new template

What We're Working on in 2026:

In 2026, the Communication Team is all about efficiency. A few of our focuses include:

- **AI Everything:** Researching how to best leverage AI tools for multi-language translation, guide automation, video voice-overs, and other efficiencies that could benefit our clients.
- **Client deliverables:** Continuing to update outdated guides and microsites. We're also developing our Game Plan Tool to help position you as a communication strategist - more to come!
- **Capacity Growth:** Adding a fifth team member in June to handle increased project volume and reduce turnaround times. Plus, implementing enhanced Monday.com features for better project tracking and communication.

Note: These initiatives are in various stages of research and development. We'll share updates as they become available.

Quick Tip: Utilizing Microsite Pop-Ups

(example pop-up here)

Our 2025 data shows pop-ups significantly increase employee engagement. With this in mind, we've established clear standards for microsite pop-ups to maximize employee engagement! These include:

- **Active Enrollments AND Benefit Changes:** Pop-ups are now automatic for clients with active enrollments
- **Passive Enrollments OR No Benefit Changes:** Use our request form to explicitly request a pop-up be added to a microsite. Please note what the pop-up message should be in the request description.
- **Smart Timing:** Pop-ups run from open enrollment start date through 11:30 PM on open enrollment end date.

Technology Team

2025 Highlights

The Tech Team had our first full year of Monday tracking!

- **996** tickets submitted
- **38%** still submitted by tech team on behalf of Benefits Team
- This only has what was submitted with new rollout. 2026 we will be pushing for tickets to be primary way of asking for help
- Requests by Type by Tech Team:

  - **425** Censuses Pulled
  - **173** Open Enrollments
  - **118** Billing Tools

  - **71** General Troubleshooting Tickets
  - **65** File Feed Support Tickets
  - **59** Client Consulting Tickets

  - **30** New System Implementations
  - **14** Betsy Cases

Ramping Up for 2026

- Hiring 2 new positions + a summer intern
- Increased Stewardship/Consistency through 5 Point Inspection Rollout
- Increased Sales Support through Tech Team Story Pt 2
- Bolstering HRIS vendor relationships for increased support for clients
- **NEW** Scope of Services for better timing and guidelines

2026 So Far

- Shorthanded completed billing tools, so we have requested extensions for some clients but almost through them now
- Corrections being made based on billing tool review and we have found several situations where we are working to clean those up. Still a lot of clean up from 2025 has kept the team busy but better to have caught them early. Many of these can be avoided by involving the tech team for a system review or having more time for the open enrollment testing
- Working through completing 2026 New Client Impact Study (previously Engagement Team Study) for March!

Trends:

- More clients are looking to move payroll
  - Reach out if you need help at the beginning of clients looking for new payroll so we can help guide them to the correct options
  - Reasons Why
    - Paychex acquisition of Paycor has decreased service
    - UKG continued pricing increases with worsening service
    - More HR turnover looking for efficiencies to be gained
- Navigator Pricing model change causing shakeup in the marketplace. Be ready for pricing models to change for other brokers who may have previously given this away for free
  - Broker pricing – Seat license costs by broker users
  - General Agency / Support Partner – a PEPM based on number of lives on the system + seat license costs
- Healthcare costs rising and marketing had shortened many timelines last year, causing tension on the system and clients. Through 2026 if would be best to get ahead of this or involve the tech team early if you need help, even if you don't have results yet, since costs look to continue to rise
  - Looking to better sync Monday process for OE dates so we can divide and conquer between the team and spread throughout Q4 better

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Technology Team - Big Picture

Submit Tech Requests so we can help you 😊

Do it early so we can get in the queue!

Manage the timeline expectations.*

*Be wary of team capacity when crunching timelines because this is where errors happen.