

CASE STUDY SERIES

REGIONAL BANKING



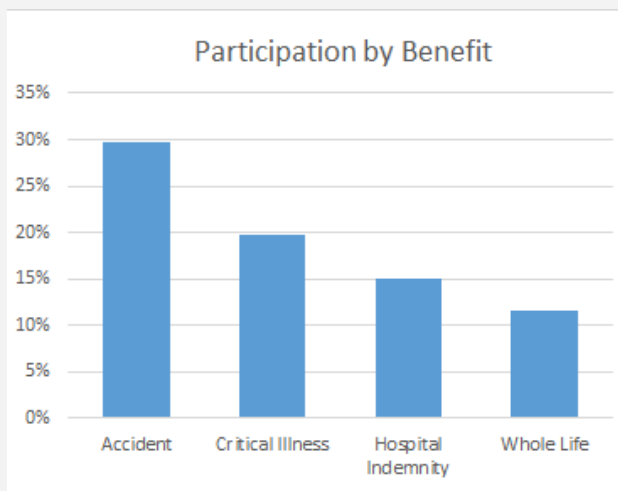
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ENROLLMENT HIGHLIGHTS

SCENARIO:

- Regional Bank with 1,700 Employees spread out throughout the upper Midwest
- Client was looking to roll out a voluntary benefit strategy in conjunction with increasing HSA contributions and driving participation in the High Deductible Medical Plan
- Geographic disbursement and lack of face-to-face capabilities due to COVID-19 made communicating enrollment information difficult this year



THE SOLUTION:

- Clarity partnered with the broker to roll-out a customized pre-communication strategy with Announcement flyers, Reminder Messaging, and Emails.
- Employees used Clarity's online scheduling tool to schedule 1:1 enrollments via outbound calls
- Calls were scheduled from 7:00 AM to 8:00 PM which allowed employees to coordinate calls outside of regular working hours.
- The Clarity team built a technology platform to capture ancillary benefit elections

THE RESULTS:

- 1,682 out of 1,700 employees enrolled with a Clarity benefit counselor through pre-scheduled telephonic meetings
- Employees and their spouses were able to verify their personal information, review their medical options and learn about new supplemental benefits with Clarity counselors during a 30-minute consultative phone call
- Enrollments totaled \$493k in worksite benefit premium
- Participation in the HSA Medical plan went from 19% to 38%

Plan Type	2020		2021	
HSA	243	19%	478	38%
Traditional	1004	81%	767	62%
Total	1247	100%	1245	100%

THE CLARITY DIFFERENCE:

By combining enrollment & technology, the broker, carrier, employer and their employees received a customized and streamlined benefits enrollment experience

Employee Experience Survey

RESULTS RECAP

OVERALL EXPERIENCE

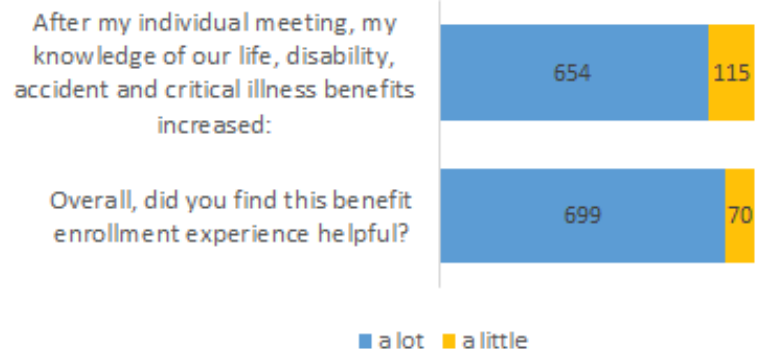
From the responses received:

- 91% of employees found that this experience was helpful.
- **85%** of employees felt that their knowledge of benefits offered increased after meeting with a counselor.

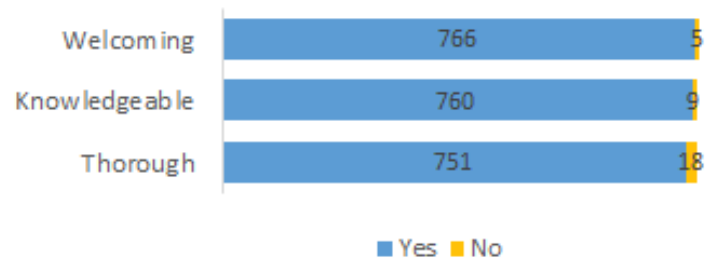
HOW WERE OUR COUNSELORS?

- At least **99%** of responses show that our counselors were Welcoming, Knowledgeable, and Thorough.

Overall Experience



My Benefit Counselor Was:



COMMENTS, CONCERNS, AND FEEDBACK



- The Benefit Counselor was personable, knowledgeable and helpful. He made the process very smooth.
- I loved chatting with a benefits expert. It made the enrollment process very easy!
- The enroller did an awesome job taking time to thoroughly go through everything. I definitely feel this was time well spent and appreciate [our company] doing this for us this year.
- The counselor helped me to understand the most important pieces of benefit coverages, and most importantly, the cost comparison. She was fantastic and deserves a raise!



1682 Employees Enrolled with a Clarity Benefit Counselor

770 Employee Survey Responses Received