



CLARKE & COMPANY
BENEFITS LLC



Employee benefits are one of the largest expenses on a company's P&L. Clarke & Company Benefits strives to bring value to your company by providing innovative and strategic solutions to your employee's benefit package. All of our solutions are technology based, making it easily accessible for all employees to learn about, enroll in, and communicate their benefits package.

This specific client has offices all over the US with over 2000 employees. Clarke & Company Benefits was hired to completely revamp the employee benefits communication strategy. Technology, accessibility, education, and participation in open enrollment were the client's main focus.

Project Outline

Open Enrollment (first of November through the first week of December, with prep beginning immediately)

- Complete redesign of Client's Marketing Pieces
- Benefit Menu Video
- Plan Comparison Video – What plan is right for you and Why?
- Pre-Enrollment email/intranet campaign
- Webinars reviewing changes, responsibilities, and what needs to be done

- High Deductible Health Plan and HSA Education (How you can save approx. 25% in taxes) (short recorded video) (Highlight firm contribution and what that does for you)
- How to best utilize your FSA and Dependent Care Accounts (short recorded video)
- Benefits 101 Link – understanding your benefits
- Social Media Campaign (Pre-Open enrollment kick off)

12 Month On-Going Communication Strategy – this process began prior to open enrollment, by evaluating the client’s initial goals and creating a plan to achieve these goals.

- Calendar for Communication Strategy
- Multi-Media Delivery (Text, Email, Webinar, Quarterly Magazine, Social Media)
- Focus groups
- **DISCOVERY PHASE**
 - JANUARY
 1. 1st Quarter Survey- objective is to evaluate the prior open enrollment and get feedback from the employee population to strengthen future enrollments
 2. Analyze enrollment in current benefit plans – provide recommendations on voluntary products... WHY – to see what benefits are getting overlooked, and work on a strategy to get enrollment up.
 3. Target communications from Claims Analysis

HUMAN RESOURCES COMMUNICATION & EDUCATION

- Beginning of every quarter – March, June, Sept, December
- Company News magazine- a magazine celebrating the company achievements, the employee’s achievements, and highlights a specific topic relating to benefits education
- Educational White Papers at the end of every quarter – March, June, Sept, December (examples)
 - What Employers Need to Know About Hiring Summer Interns
 - Active Shooter Prevention and Response Playbook
 - Best Practices for Protecting Your Data When Employees Leave
 - Social Media Use and Risk
- Quarterly Educational Webinars

ALL STAFF COMMUNICATION AND EDUCATION

- Every month: Communication outreach to employees to include print/web/video
- 2nd QTR survey- How and what medium do employees like to receive benefits information plus gauging what benefits employees would like to see

ALL STAFF COMMUNICATION AND EDUCATION

- Quarterly Communication Highlighting a specific benefit.
- Monthly Communication (Sample Topics Below):
 - Using benefits to save money
 - Using benefit for tax advantages (H S A /FSA)
 - Financial Wellness
 - 401(k) participation
 - Managing debt
 - Benefit education
 - Firm Wellbeing: Flu shots, mammography, biometrics etc. (text/Newsletter tied to a flu Clinic, Mammography bus and/or biometrics.

Strategic Plan Moving Forward

Migrate to the HDHP plan

1. Educate and push information down in several manners (Webinars, Text, Emails, Intranet)
2. Increase the contribution to the Health Savings Account
3. Increase knowledge on tax advantages of plans being offered
4. Further spread the employee cost from the PPO plan vs the HDHP plan.

Analyze benefits to the staff that they are looking for (based on responses from our survey slated in 2nd quarter) based on cost and availability. Some examples:

1. Student Loan Payment match
2. Pet Insurance
3. Subsidized dependent and child care
4. Tuition assistance
5. Individual Disability on attorneys
6. Moving expenses
7. Fitness/Wellness stipend-
8. Legal Assistance, Will prep, Estate work (do you currently give in house discounts)
9. Voluntary offerings-critical illness, accident, etc.

Through our survey we can learn how employees want to be communicated with; we then create a text/social media campaign to continue to push the education down to ever demographic. 5 generations of employees means 5 ways of wanting to consume information.

- Prevention
 1. Flu Shot Program
 2. Mammogram drive
 3. PSA Test (or do biometrics which can also have a PSA)
 4. Tobacco Cessation education.
 5. Disease Management

Summary

The client signed a contract for the project on October 10th with open enrollment starting on November 9th. Clarke & Company delivered a completed employee centric benefit website on November 8th. The site drew 2,599 page views during enrollment, 899 separate visits (over 50% of employee population) and 96 download. Clarke & Company actually delivered over the scope of the project and didn't open all the modules that were built to employees. The client is going to open new areas of site on a quarterly basis throughout the year.

Three custom videos with professional voice over was delivered with the site as well as video benefit guides for each benefit offered. Client was pleased with outcome of the enrollment materials, the site, and are now getting ready to go into the survey part of project for open enrollment.