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## 5 Steps to a Stress-Free Benefits Technology Implementation

*June 27, 2019*



Will the webinar be recorded?

**Yes!**

We will send you a link to the recording after the webinar.



Will the slides be available?

**Yes!**

We will send you a link to the PDF after the webinar.



# How do you ask questions?

Type your question into  
the “Questions” panel





## TODAY'S SPEAKER



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## 5 Steps to a Stress-Free Benefits Technology Implementation

- 1 Set Your Goals
- 2 Do Your Discovery Homework
- 3 Understand Your Team
- 4 Know the Best Practices
- 5 Define Your Implementation Strategy

## Step 1: Set Your Goals

Choose your benefits technology platform with these goals in mind






## **Twelve months from today.....**

How would you define success for your benefits technology implementation?





What HR and organizational goals do you want this platform to help you achieve this year, next year, and five years from now?

## Pick the Perfect Partner

Cloud-based is a must-have in 2019.

- Easily accessible outside of the office
- Mobile-responsive for employees and HR staff
- Updates are pushed through automatically

# Pick the Perfect Partner

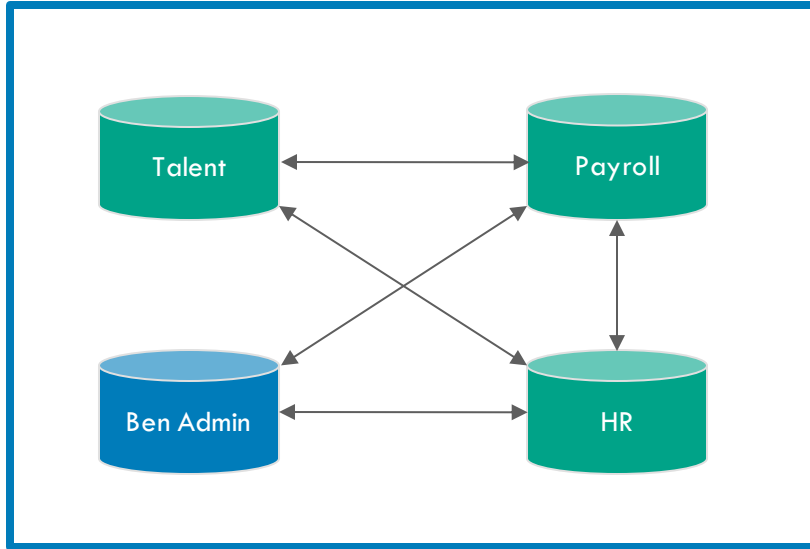
*Your new technology must be easy to use, with quick self-help tools*

## 9.3 hours

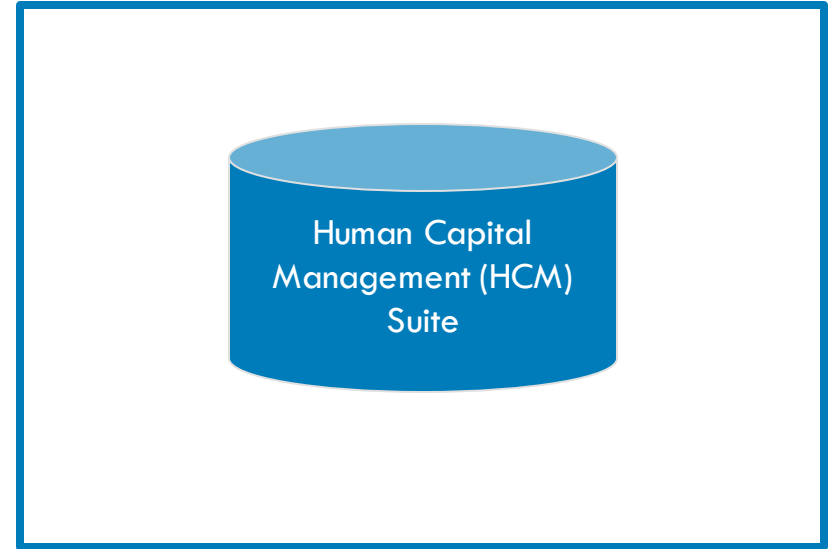
This is the amount of time per week  
employees already spend searching  
for information to do their job  
correctly

*Source: McKinsey & Company, 2012*

# Benefits & HR Technology Dilemma - Depth vs. Breadth

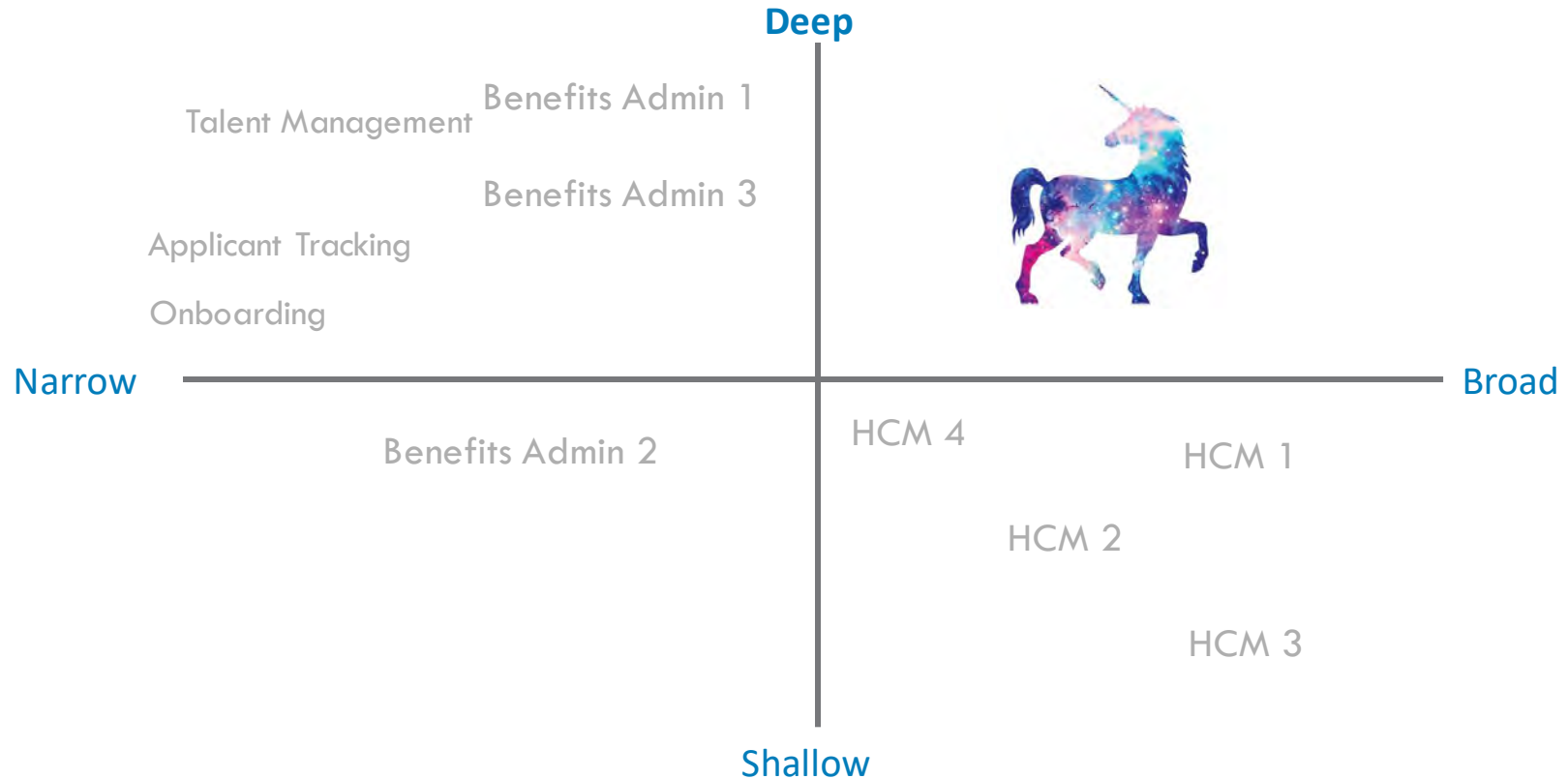


vs.



# A technology platform that's both deep and broad

*It's like a unicorn – it doesn't exist.*



## Step 2: Do Your Discovery Homework

A great implementation starts with  
great communication



# Dive into your benefits strategy

- How will it evolve in the future?
- Do you need more data and metrics related to benefits spending, adoption and employee satisfaction?
- What capabilities are you currently missing?
- How was your last OE experience?

# List Your Current Challenges



Employee engagement/knowledge of benefits



Handling employee calls



Employee location transfers



Dependent verification tracking



EOI integrations with carriers



Multiple payroll feed transparency



Admin access and security



Customized reporting





# Do Some Organizational Soul-Searching

Don't be afraid to ask tough questions!

What's unique about your company and your benefits?

What does the ideal future of your workforce look like?

Why do employees join your company?



# Analyze Your Data Processes

How are you keeping HR, payroll and benefits in sync?

Do you have visibility into your data?

How are benefit elections being updated with all your carriers?

How are you handling **EOI** with carriers?

## Step 3: Understand Your Team

Ensure that your HR goals are aligned with organizational goals



# Take Stock of Your HR Team

How many people would need training on the new software?

How many locations would have someone responsible for managing the benefits program?

How well is your team equipped to handle problems when stuff goes wrong, like data discrepancies, urgent coverage resolutions and data accuracy?

# Who's Responsible for What?

## HR Administrator

Provide the configuration analyst with all benefits data like rates, rules, dates, schedules, and eligibility, and then validate the system configuration

## Payroll Manager

Understand your current payroll installation to determine the impact to the payroll calculation that will be used for deductions

## Finance

Understand your current payroll installation to determine the impact to GL with the change of deduction and earning codes

## Broker Representative

Work with the HR administrator to provide all benefits data and then validate the system configuration

# Examine Your Workforce

*How tech savvy are they really? It could be more than you'd think ...*

**81%**

of Americans own a smartphone,  
and 1 in 5 Americans use  
smartphones as their primary  
means of online access at home

*Source: Pew Research Center, 2019*

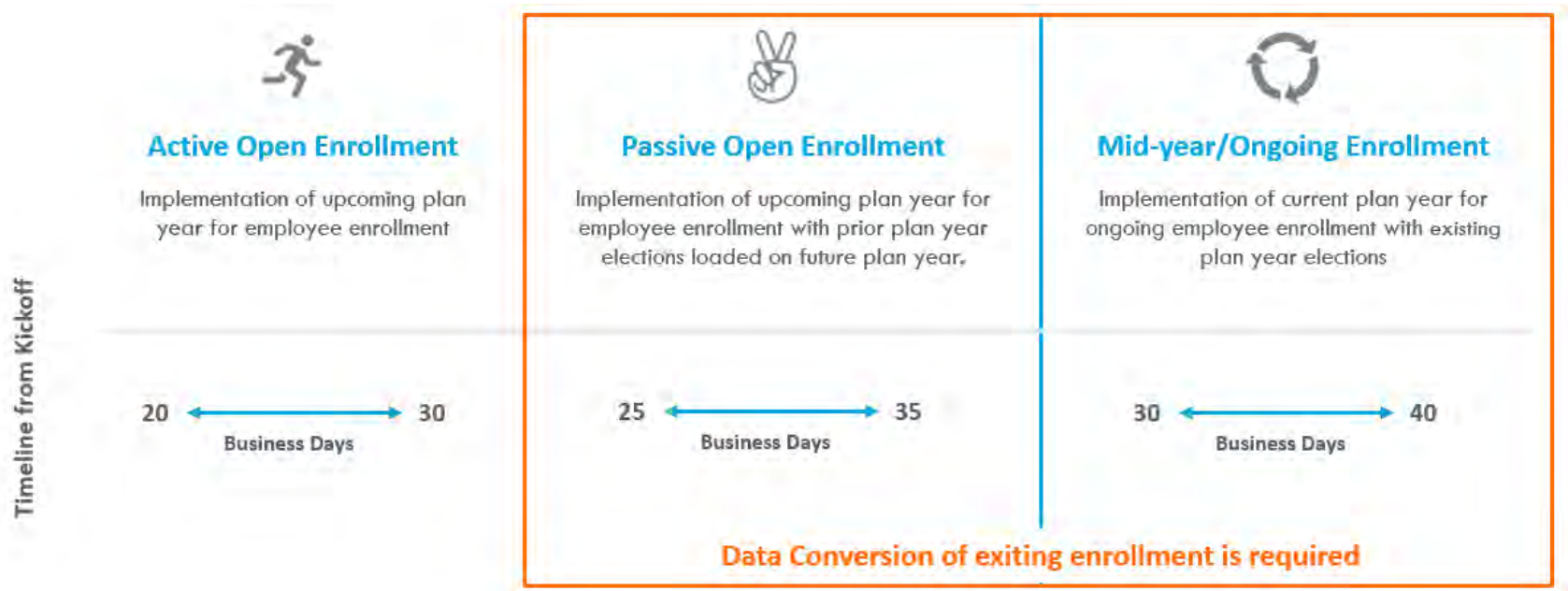
## Step 4: Know the Best Practices

Everything you wanted  
to ask about benefits  
technology implementations  
(but were too afraid to ask!)



# What's Your Onboarding Approach?

*Choose the right launch style that will fit within your available timeframe*





# How Much Time Will This Really Take?

## HR Administrator

On average, 5-10 hours per week. Effort hours will be highly variable based on complexity and the size of team.

\*There are "clusters" of work - some weeks will be 2 hours; others could be up to 20 hours depending on the task.

## Payroll Manager

Ad hoc work effort will be needed to ensure the payroll deductions, codes, and mapping are correct for payroll processing.

## Finance

Ad hoc work effort will be needed to ensure the payroll deductions, codes, and mapping are correct for GL mapping.

## Broker Representative

On average 2-5 hours per week. Effort hours will be highly variable based on complexity and the level of broker engagement.

# What Documentation Do You Need to Have Ready?

## High Priority

Benefit Guides  
Carrier Summaries  
Employee Communications  
Total Monthly Premiums

## Lower Priority (but still important)

Policy or Plan Numbers  
Carrier Technical Contacts  
Eligibility Waiting Periods  
Benefit Class Descriptions  
Location List  
Payroll Calendar

## HR Admin Tasks

1  
2  
3

### Daily Tasks

- Urgent eligibility processing
- New hire and life event processing
  - COBRA enrollment and administration
  - FSA/HSA/HSA administration
  - Document verification for newly added dependents



### Weekly Processing

- Data exchange oversight
- Evidence of Insurability processing
- Payroll Deduction Arrears and Credit Processing
  - Enrollment transactions to insurance carriers
  - New hire and status change communications booklets



### Monthly Reporting

- Invoice reconciliation and payment
- Self-bill creation
- Consolidated billing and financial reporting
  - COBRA premium remittance
  - COBRA auditing and reporting
  - FSA auditing and reporting
  - Direct billing of retirees and employees on LOA

## HR Admin Tasks



### Quarterly Activities

- Full carrier enrollment audits
- Full audit of payroll deduction data
- Employee engagement campaigns



### Annual Projects

- Renewal / Open enrollment
- Employee confirmation statements
- Post-OE payroll updates and audit
- Post-OE debrief
- HSA ER Contribution Processing in Payroll



### Compliance Reporting

- ACA Measurement and stability period oversight
- 1094-C creation and transmittal
- 1095-C creation and transmittal
- 1095-C fulfillment
- Calendar of employee notifications

## Step 5: Define Your Implementation Strategy

Change is hard!



Change is hard for employees, managers  
and executives.

“The status quo threatens innovation, and  
stagnant companies put themselves in danger of  
failure. By investing in cutting-edge technology,  
you’re investing in growth.”

*Source: Reflektive, 2019*

# Be Open to Enhancing the Current Process

## Don't:

- Layer old processes on the new software
- Be afraid to end current practices that exist because of system or resource limitations

## Do:

- Focus on how to streamline processes and remove any manual procedures that are time-consuming and can lead to errors
- Embrace the new and improved processes with a welcoming attitude

# Engage Employees Right from the Get-Go

Big change initiatives are nearly twice as likely to fail as a result of organizational resistance rather than technical or operational issues.\*

Use your top “influencers” – a network of champions who can coach others on how to use the tool to their benefit.

*\*Source: Ivey Business Journal, 2012*



## Focus on the End Results

Successful implementation requires that you establish and communicate realistic expectations for your management team and employees.



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## Q&A

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