

# Meet Your New Teammate ALEX: The Secret to Having the Best Enrollment Ever

*Taylor Clausen, VP of Strategic Partnerships, Jellyvision*

*Brian Philips, Principal Solutions Consultant, PlanSource*



**alex**



**PLANSOURCE**





**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).



# Q:

## How do you ask questions?

Type your question into  
the "Questions" panel

The screenshot shows the GoToWebinar Control Panel interface. At the top, there's a title bar 'GoToWebinar Control Panel' with standard window controls. Below it, a sidebar on the left contains links: 'Screen Sharing', 'Dashboard', 'Attendees: 1 out of 1001', and 'Audio'. The main content area is titled 'Use:' and has two radio buttons: 'Telephone' (selected) and 'Mic & Speakers'. Below this, it displays 'Dial: +1 (415) 655-0059', 'Access Code: 732-878-437', and 'Audio PIN: 77'. A note says 'If you're already on the call, press #77# now.' with a link 'Problem dialing in?'. The 'Talking:' section has a 'Webcam' link and a 'Questions' link (highlighted in blue). Under 'Questions', there's a checkbox 'Show Answered Questions' and a table with columns 'Question' and 'Asker'. Below the table is a large text input field. At the bottom of the 'Questions' section are 'Send Privately' and 'Send To All' buttons. Further down, there are links for 'Polls' and 'Chat'. The footer area shows 'Test - Witnessing History', 'Webinar ID# 154-586-243', and the 'GoToWebinar' logo.



# Today's Speakers



**Taylor Clausen**  
*VP of Strategic Partnerships*  
Jellyvision

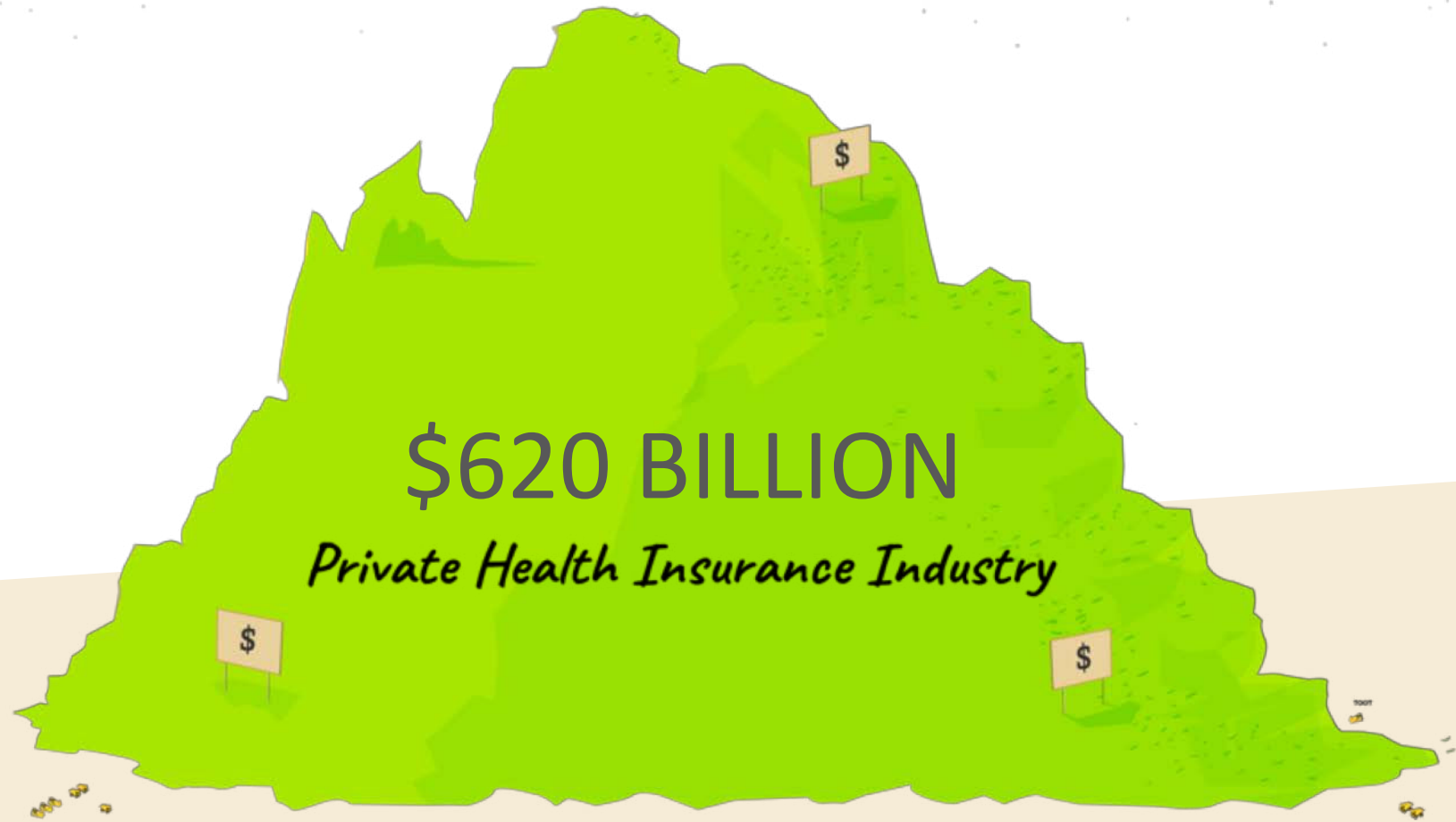


**Brian Philips**  
*Principal Solutions Consultant*  
PlanSource



BENEFITS ARE MORE COMPLEX THAN EVER.

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**Insurance Company 1: Plan Option 1**  
Summary of Benefits and Coverage: What this Plan Covers & What it Costs

**Insurance Company 1: Plan Option 1**  
Summary of Benefits and Coverage: What this Plan Covers & What It Costs

**This is only a summary.** If you want more details, contact your insurance agent for the complete document at [www.\[insert\]](#) or by calling 1-800-[insert].

Important Questions	
What is the overall deductible?	\$500 person / \$1,000 family Doesn't apply to preventive care
Are there other deductibles for specific services?	Yes. \$300 for prescription drug coverage. There are no other specific deductibles.
Is there an <del>out-of-pocket</del> limit on my expenses?	Yes. For participant \$2,500 person/family For non-participant \$4,000 person
What is not included in the <del>out-of-pocket</del> limit?	Premiums, but changes, and plan doesn't cover
Is there an overall annual limit on what the plan pays?	No.
Does this plan use a network of providers?	Yes. See web call 1-800-1-participant
Do I need a referral to see a specialist?	No. You do not see a specialist
Are there services this plan doesn't cover?	Yes.

Questions: Call 1-800-[insert] or visit [www.\[insert\]](http://www.[insert]) if you aren't clear about any of the above or call 1-800-[insert]

Insurance Coverage Examples

Examples:

These examples show how a patient might cover medical care costs. Use these examples to get a general, *how much financial protection* the patient might get if they are covered under different plans.

 This is  
not a cost  
estimator.

Don't use these examples to estimate your actual costs under this plan. The actual care you receive will be different from these examples, and the cost of that care will also be different.

See the next page for important information about these examples.

**Questions:** Call 1-800-[insert] or visit us at [www.\[insert\]](http://www.[insert]).  
If you aren't clear about any of the underlined terms used in this form, see the Glossary. You can view the Glossary at [www.\[insert\]](http://www.[insert]) or call 1-800-[insert] to request a copy.

**Insurance Company 1: Plan Option 1**  
Summary of Benefits and Coverage: What this Plan...

**Insurance Company 1: Plan Option 1**  
Summary of Benefits and Coverage: What this Plan...

The image is a collage of overlapping insurance policy documents, primarily from PPO (Preferred Provider Organization) plans. A large, stylized purple question mark is superimposed over the center of the collage, indicating a state of confusion or inquiry about the insurance details.

The visible documents include:

- Top Left Document:**
  - Header: "Common Medical Event"
  - Section: "Services You May Need"
  - Coverage Period: 1/1/2011 - 12/31/2011
  - Coverage for: Individual + Spouse | Plan Type: PPO
- Top Right Document:**
  - Coverage Period: 01/01/2013 - 12/31/2013
  - Coverage for: Individual + Spouse | Plan Type: PPO
  - Table with columns: "Your Cost If You Use a Participating Provider", "Your Cost If You Use a Non-Participating Provider", and "Limitations & Exceptions".
- Bottom Left Document:**
  - Section: "Managing type 2 diabetes" (routine maintenance of a well-controlled condition)
  - Amount owed to providers: \$5,400
  - Member pays \$3,520
  - Insurance pays \$1,880
  - Section: "Simple care costs:"
 

Prescriptions	\$2,700
Medical Equipment and Supplies	\$2,100
Office Visits and Procedures	\$900
Education	\$900
Laboratory tests	\$500
Vaccines, other preventive	\$200
	\$700
  - Section: "Patient pays:"
 

Deductibles	\$800
Copays	\$500
Coinsurance	\$80
- Bottom Right Document:**
  - Table with columns: "Not Covered", "Partially Covered", and "Fully Covered".
  - Row 1: "Limited to one exam per year"
  - Row 2: "Limited to one pair of glasses per year"
  - Row 3: "Covers up to \$50 per year"

Note: These numbers assume the patient is participating in our diabetes wellness program. If you have diabetes and do not participate in the wellness program, your costs may be higher. For more information about the diabetes wellness program, please contact: [insert].







# EMPLOYEE CONFUSION IS A MULTI-BILLION DOLLAR PROBLEM.

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- Waste from wrong plan choices
- Lost tax savings
- HR overwhelmed with questions

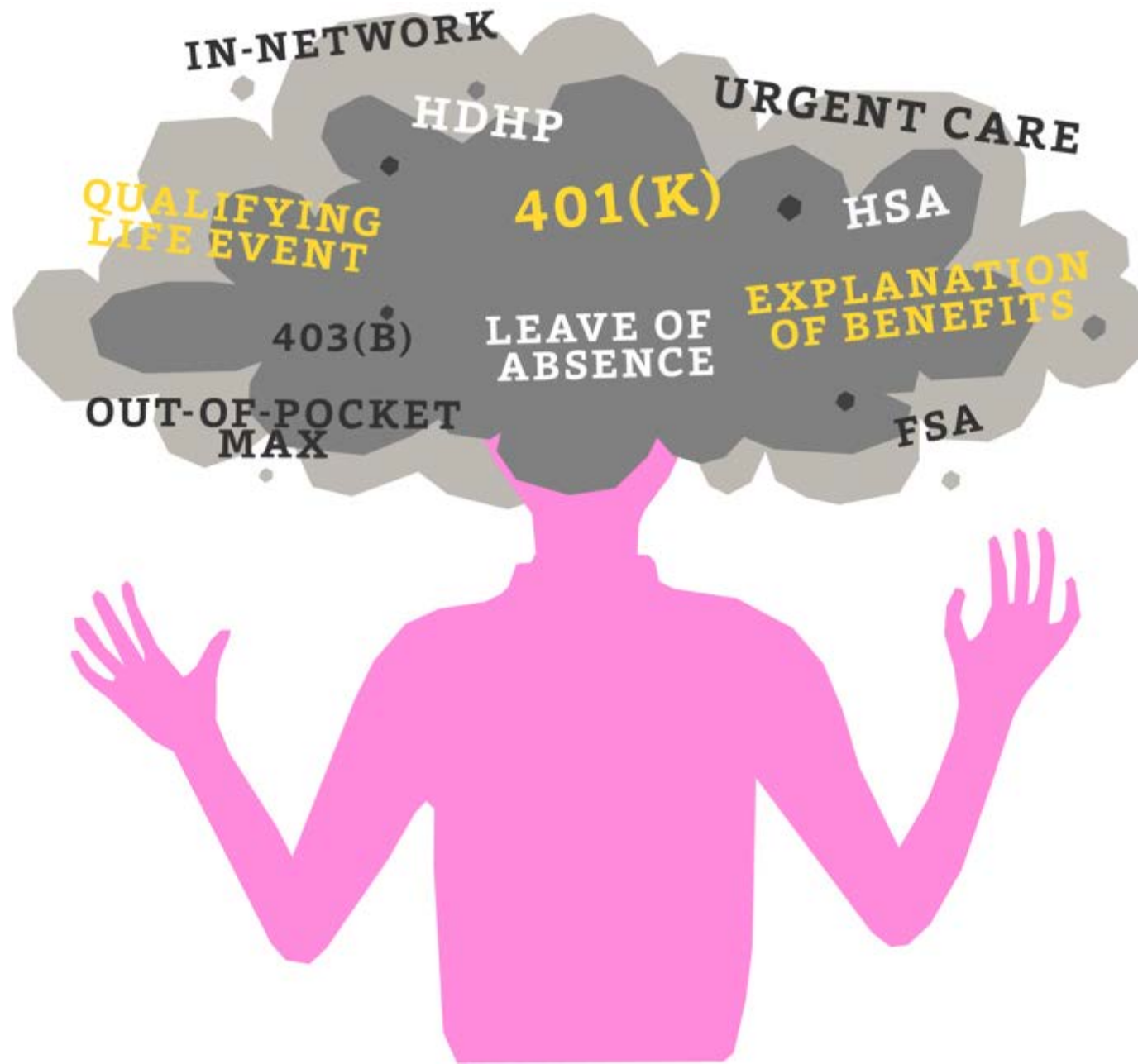




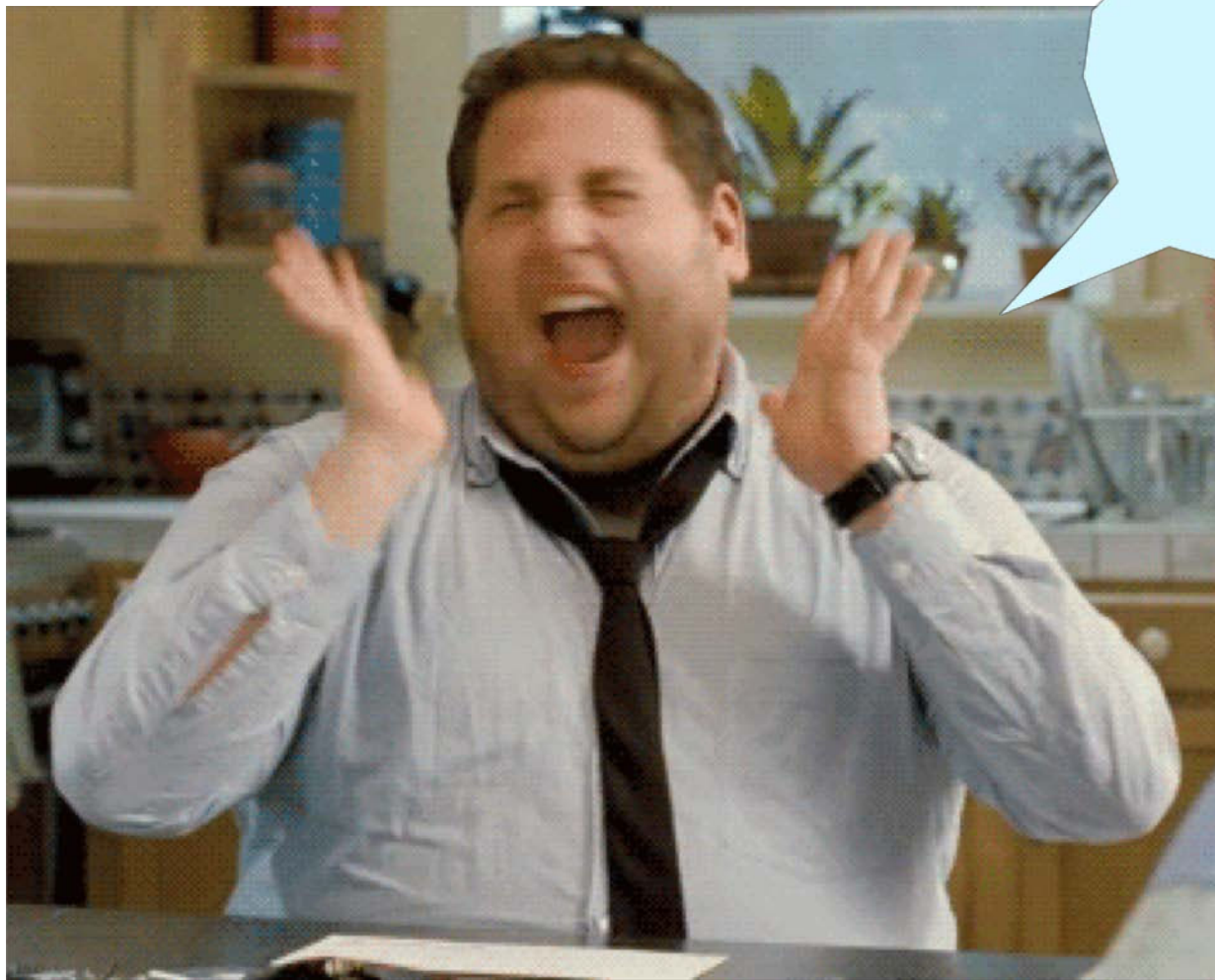


# The Curse of Knowledge









**IT'S OPEN  
ENROLLMENT!?**



NETFLIX ORIGINAL

# TIDYING UP

WITH MARIE KONDO

99% Match 2019 TV-PG 1 Season

Watch Season 1 Now

In a series of inspiring home makeovers, world-renowned tidying expert Marie Kondo helps clients clear out the clutter -- and choose joy.

▶ PLAY

+ MY LIST



Starring: Marie Kondo

Genres: TV Shows based on Books, Home & Garden TV Shows, Lifestyle

This show is: Heartfelt, Feel-good, Inspiring



## 5-on-5: Biggest NBA playoff surprises and disappointments

Our NBA experts break down the standout storylines in each conference.

1,699,418,714 views

- DeRozan fined \$25K for tossing ball at referee
- 🏆 Next for the Heat: Make big deal now, or wait?



11M



457K



SHARE



SAVE



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A Digital  
Ad Agency

alex®

Jellyvision™

JACK

A Gaming  
Company

A Television  
Production Company







# 3

## **ALEX Ingredients**



# 1

Answer the  
#1 most important question



The image features a large, stylized white snowflake in the center, composed of many small, irregular polygons. The text "WIIFM" is written in a bold, pink, sans-serif font across the middle of the snowflake. The background is a solid teal color with several darker teal, wavy, cloud-like shapes. There are also three smaller, stylized white snowflakes scattered around the main one: one in the top left, one in the bottom right, and one in the bottom center.

**WIIFM**



The background is a solid teal color. It features several white, stylized cloud-like shapes. A large, irregular white shape in the center contains the text. There are also three smaller white shapes: one in the top left, one in the bottom right, and one in the bottom right corner. The text is in a bold, pink, sans-serif font.

**WHAT'S IN IT FOR ME?**



If benefits offerings were an espresso machine,  
here's what you may see...

### YOUR SO GREAT ESPRESSO MAKER





...but here's what your clients and their employees want





# WIIFM IS NOT THE THING



STEAM TEMP LIGHT

DOSE BUTTON

GRIND SELECTOR

INTEGRATED TAMPER

GRINDING CRADLE

REMOVABLE DRIP TRAY

TRU-GRIND BURR TECH



# WIIFM IS WHAT YOU *GET* FROM THE THING



## HDHP WITH HSA PLAN

Ready to see why  
this plan might be  
your best fit?

Yes, show me.

No thanks, I'm ready to  
decide.

I'll pick this plan.



# 1a

Talk to “You”



The Hub > Who we are

te Content

cture

team

ssages

work

is an ITB/SSC

ing strategies

holders

n links

g Our Vision

cutive is

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sion

ple

enefits

ted Pay Award

## Flexible Benefits

### MyFlex – make the most of it today

Further information on how to access [MyFlex](#) and make your benefit selections can be found in the:

- [MyFlex User Guide](#)

Other useful information on this site includes:

- [MyFlex Booklet](#) (which was originally sent out with new contracts in February 2012)
- [Life Events Summary Table](#) (which sets out situations when you are permitted to make changes to your Flexible Benefits outside the annual process)
- [Tax and NI Summary Table](#) (which summarises the tax and national insurance treatment of each of the Flexible Benefits)
- [Flexible Benefit FAQs](#)

### Making changes to MyFlex choices during the year

If you experience a 'life event' such as marriage, the birth of a child, or return from a career break, you will be able to make or change certain Flexible Benefit choices.

A full list of the eligible life events are listed in the [Life Events Summary Table](#).

In order to be able to make choices following a 'life event' please contact the MyFlex helpline on 01372 387001, or email [re.net](#). A 'Flex window' will be open for you to make choices.

Please note that where a Flex window is opened for a 'life event' there will be certain restrictions on the specific MyFlex choices you can make. For instance, you will not be able to select Buy/Sell or Cycle2Work; these Flexible Benefits can only be selected at each annual enrolment period.

For those that missed the annual enrolment deadline of 4th December to make their MyFlex choices due to absence from work, the following facilities are available:

- For those who are returning from maternity leave, paternity leave, parental leave, career break or extended unpaid leave, these are classed as 'life events' which open a specific Flex window for you to make choices on your return to work, subject to the restrictions referred to above.
- For those who have returned from extended sickness absence, this is not classed as a 'life event', however if this prevented you from making choices during the year, please contact HR to see if a facility can be made available for you.
- In addition, any employee can request to go into the MyFlex system at any time to select or change their level of Childcare Vouchers, Charitable Donations or Retirement Savings (within the limits available) but will not be eligible to select any other benefits until the next annual enrolment period.

If you have any questions, please contact the MyFlex helpline on [01372 387001](#)



Not counting  
preventive  
checkups, how  
many times will you  
see your primary  
care doctor?

For your family all together:

visit(s)

Submit.

None.





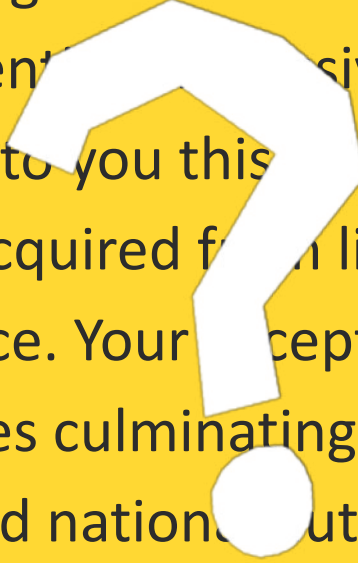
2

Write the way you talk



JARROON\*





“The historical trends have led me to conclude that by doubling or even tripling our efforts of efficiency on the domestic front, it will yield a new entire synergistic proportions. I therefore wish to present to you this exhibit **a composite of metallic and mineral elements** acquired from licensed retail channels as a symbol of our new alliance. Your acceptance of this strategy would launch a series of initiatives culminating in an event that would be in compliance with local and national authorities and internationally recognized by virtually all foreign governments. **Your prompt feedback in this matter is in the best interests of all stakeholders.**”

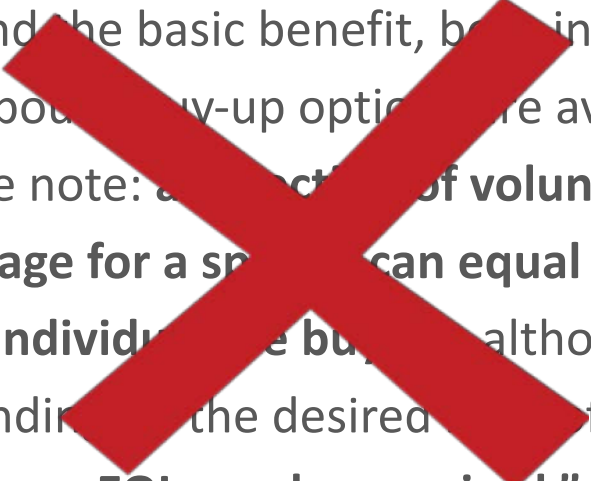






“Dear **Employee,**

Beyond the basic benefit, both individual and spousal buy-up options are available. Please note: **the maximum of voluntary life coverage for a spouse can equal up to half your individual coverage, although depending on the desired amount of coverage, EOI may be required.”**



“Hey **Jerry,**

The company is going to buy some life insurance for you. If you want, you can buy extra.

**Whatever life insurance you buy for yourself, you can also buy up to half that amount for your spouse.**



Now, depending on how much additional insurance you'd like, one or both of you may need to answer some questions about your health to see if you qualify for it.”



3

Humor



# Humor is scientifically proven to:



1

Keep people  
more engaged



2


Improve people's  
comprehension of  
complex info



3

Help people retain  
more info, longer





You **lose 30%** of your  
audience when your  
communications are **boring**



*“...putting the participants in a good mood before the test by having them think happy thoughts more than doubled accuracy.”*

**Daniel Kahneman**  
Psychologist



The background is a solid teal color. It features several white, cloud-like or bubble-like shapes. A large, irregular white shape in the center contains the text. There are also smaller white shapes: one in the top left, one in the bottom right, and another in the bottom right corner. The overall style is clean and modern.

**Hey, this all sounds cute! But what does it mean for my employees & my benefits?**



People who use Jellyvision-  
designed experiences

**BEHAVE DIFFERENTLY**

than those who don't



Employees who talk to ALEX are

3X

more likely to choose an HDHP than  
those who don't



Employees who talk to ALEX save  
an average of

10.8%

of their paycheck in their 401(k)



Employees who talk to ALEX  
contribute

44%

more to their HSA than those who don't





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Let's look at a demo!





*We'll email this to you!*



# Questions?







SHRM – Activity ID: 19-QC7QX

HRCI – Activity ID: 386524



# Thank you!



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