

PLANSOURCE

360° of Open Enrollment

INSIGHTS & PREDICTIONS FROM AN INDUSTRY PANEL

Today's Panel of Speakers

THE BROKER



Brian Murphy
Owner & Partner
Lawley Insurance

THE CARRIER



Laura Bongiorno
VP-Specialty Market Sales
The Hartford

THE HR LEADER



Christy Guilbault
Benefits Solutions Sr. Manager
Entertainment Partners

THE TECH PROVIDER



Ryan Jepson
Product Manager
PlanSource

4 EXPERTS FROM DIFFERENT ANGLES OF BENEFITS OE



Lawley

INSURANCE | EMPLOYEE BENEFITS

**LAWLEY
INSURANCE**

Buffalo, New York

11 offices across NE

Top 100 Independent
Insurance Agency in US

Represents 350+ carriers
& wholesalers

**THE
BROKER**



THE HARTFORD

Hartford, Connecticut

Fortune 500 Company

PlanSource Boost Partner
since Jan. 2020

Boost APIs: EOI, Plan
Configuration, Member
Portal & Enrollment

**THE
CARRIER**



**ENTERTAINMENT
PARTNERS**

Burbank, California

12,000+ employees

High-turnover employee
population in 49 states

PlanSource customer
since 2013

**THE HR
LEADER**

PLANSOURCE

PLANSOURCE

Orlando, Florida

Leading Ben Admin
software company

Founded in 2008

Serves Brokers, Carriers,
Employers & Resellers

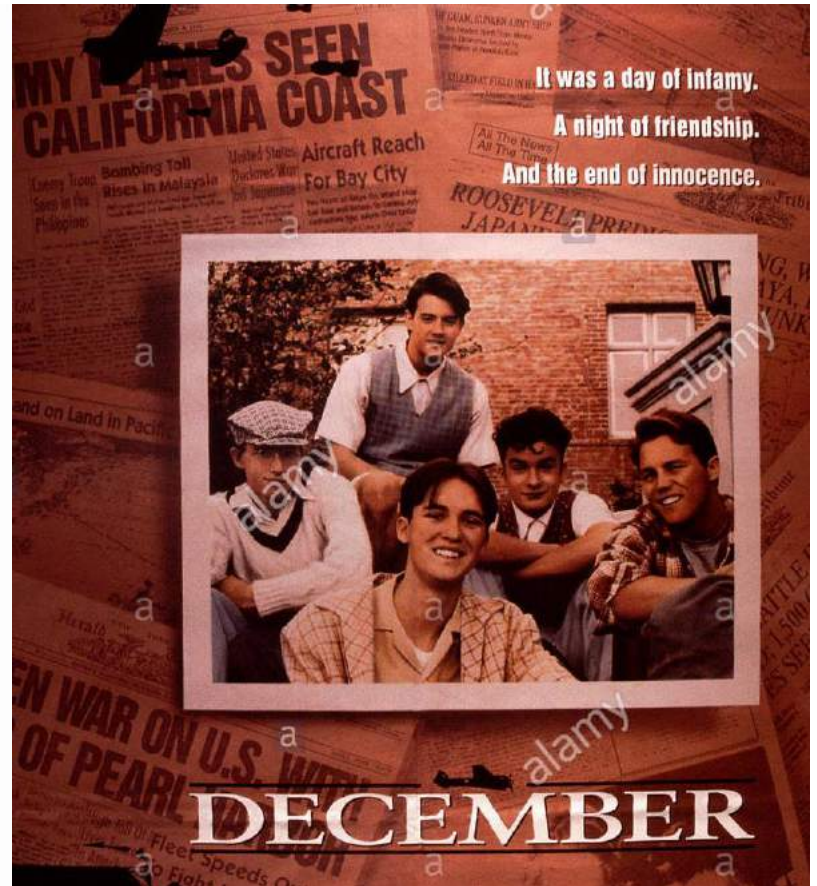
**THE TECH
PROVIDER**



INTRODUCING

Brian Murphy

Owner & Partner
Lawley Insurance





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Laura Bongiorno

VP, Specialty Market Sales
The Hartford





INTRODUCING

Christy Guilbault
Benefits Solutions
Senior Manager
Entertainment Partners





INTRODUCING

Ryan Jepson

Product Manager: HR Leader
Experience
PlanSource



AUDIENCE POLL




POLL QUESTION #1

Which best describes
your current role?

TOPIC 1

Looking back 5 years



How has open enrollment
changed for benefits brokers
& consultants?



How has the role of HR evolved
within organizations over the last
5 years?



What have been the most significant technology advancements for benefits enrollment the last 5 years?

TOPIC 2

How employee benefits offerings are changing

AUDIENCE POLL

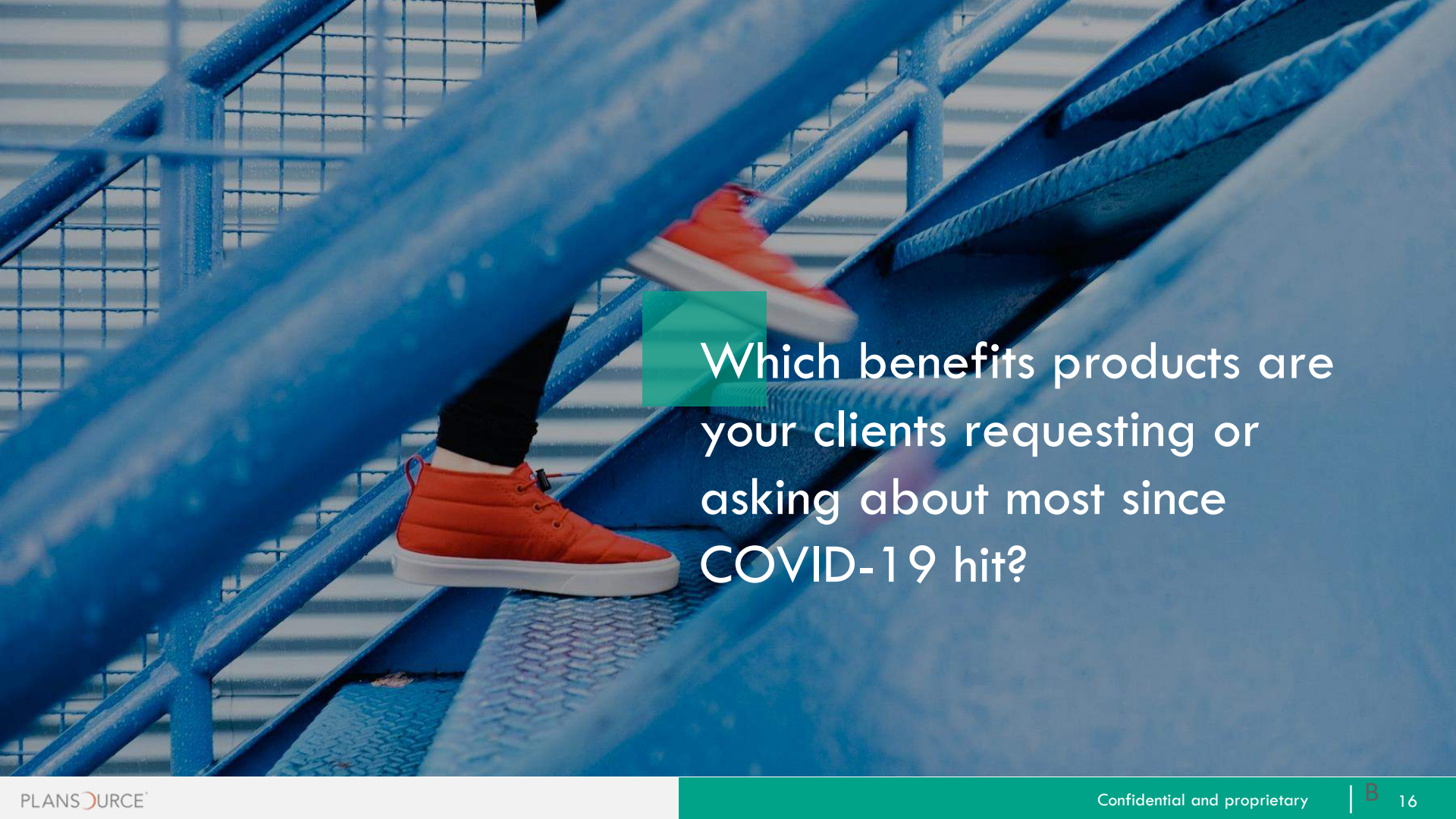


POLL QUESTION #2

Did/Are you making any changes to your benefits offerings for the 2021 plan year?




What trends are you seeing around the plans & products offered to employees?

A person wearing bright orange sneakers with white soles is walking on a blue metal staircase. The person is wearing black leggings. The background is a blue metal railing and a chain-link fence. The scene is outdoors and appears to be a public space.

Which benefits products are your clients requesting or asking about most since COVID-19 hit?



What are you hearing from employees around the benefits &/or coverage they want?

A photograph of two hands clasped together, one appearing to be an adult's hand and the other a child's. A solid teal square is overlaid on the child's hand. The background is a soft, out-of-focus grey.

How do we make complex products easier to understand in a ben admin system?

QUICK TAKE


What's one positive that's
come out of COVID-19 for
you – personally or
professionally?

TOPIC 3

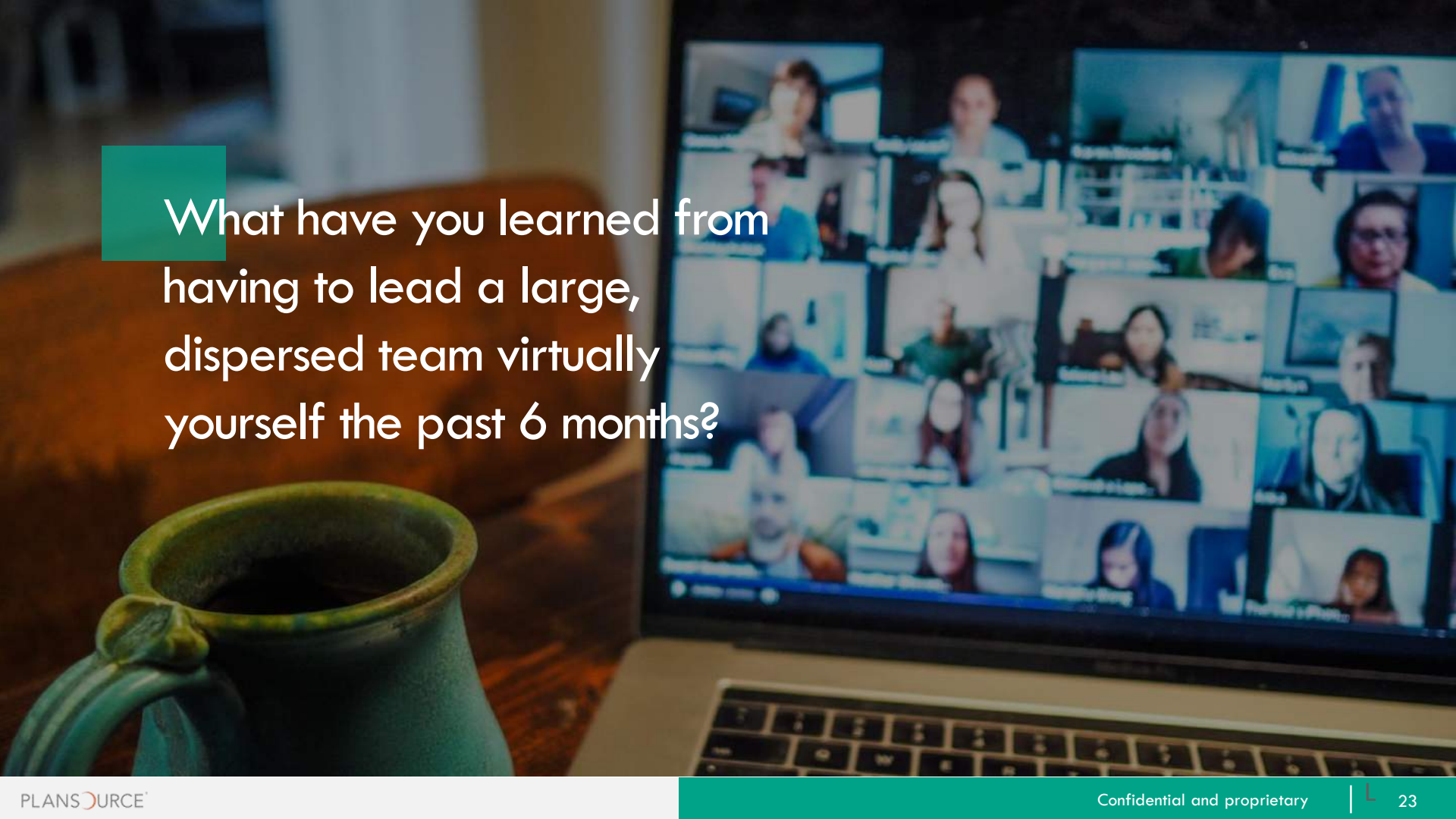
Pivoting for a virtual-first workplace



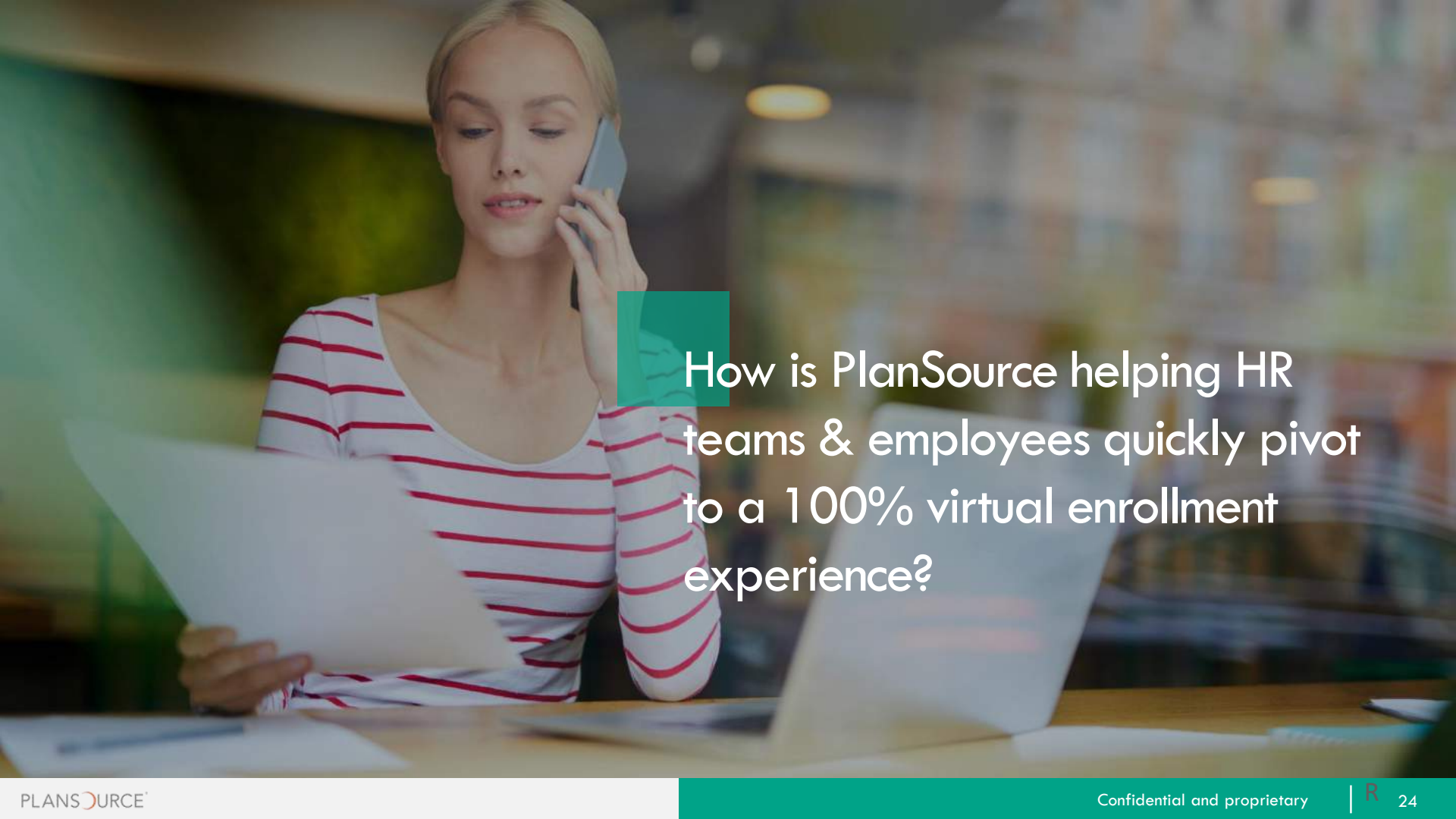
What advice do you give clients for communicating with & educating employees about their benefits virtually?



How have your OE communications changed, & what's been most effective for engaging remote employees?

A photograph of a laptop screen displaying a virtual meeting with many participants. In the foreground, there is a green ceramic mug. The background is slightly blurred, showing a desk and a chair.

What have you learned from having to lead a large, dispersed team virtually yourself the past 6 months?

A woman with blonde hair, wearing a red and white striped long-sleeved shirt, is sitting at a desk. She is holding a smartphone to her ear with her left hand and looking down at a document she is holding with her right hand. A laptop is open in front of her. The background is a blurred office environment with warm lighting.

How is PlanSource helping HR teams & employees quickly pivot to a 100% virtual enrollment experience?

TOPIC 4

2021 Predictions

AUDIENCE POLL



POLL QUESTION #3

Which benefits trends are you most concerned about over the next 12 months?

What trends should be top-of-mind for brokers heading into 2021?





Where will the most innovative insurance carriers spend the bulk of their resources & efforts in 2021?

A hand holding a crystal ball over a sunset over the ocean. The crystal ball reflects the sunset and the ocean. The background is a sunset over the ocean with a blue sky and a yellow sun.

How will benefits enrollment be different for HR Leaders & employers at the end of 2021 compared to now?



How is benefits technology
evolving to meet rapidly
changing market & workplace
needs?

Q&A

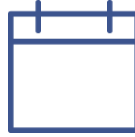
QUICK TAKE

What's one takeaway you have for your counterparts?

CONTINUING EDUCATION CODES

HRCI: 536548

SHRM: 20-KM6WQ



UPCOMING WEBINAR

Rise Above the Noise: Elevate Your OE Performance with Content Marketing

WEDNESDAY, NOV. 4
2PM ET / 11AM PT

Thank You!