

Case Study: Heinen's Uses PlanSource to Increase Operational Efficiency and Simplify Benefits Administration

About Heinen's

Established in 1929, Heinen's is a family grocery business that continues to hold their high standards of customer service and quality products for nearly a century. With a diverse workforce comprised of in-field retail and warehouse workers to administrative and managerial roles, Heinen's has complex needs when it comes to benefits management. Since partnering with PlanSource in 2018, the grocery company has pivoted from manual, paper-based processes to our online, automated software. This has helped Heinen's save immensely on time, costs and efficiency.

Metro Health



Industry: Food & Grocery



Employees: 4,000+



Location: Cleveland, OH



heinens.com



"It's like shopping on Amazon! You just review your information, click through things you want, and add them to your cart ... it's been like night and day since switching to PlanSource."

– **Ashley Bales**, Benefits and Leave Specialist

Challenge

Heinen's HR team had been overwhelmed for years by their tedious, disorganized paper-based benefits processes. The team was burdened with hands-on collection of over 4,000 employees' enrollment forms, correcting a multitude of errors and updates, and inputting this information into their insurance carrier's website. With such a diverse workforce comprised of in-field retail and warehouse employees, as well as administrative and managerial roles, Heinen's complex configuration was cumbersome to manage.

- Life-event changes would take an average of 3 days to process
- Boxes of paper forms filled the office waiting to be entered by hand
- Very difficult to conduct meaningful reporting

Solution

The PlanSource Advantage Program was a unique solution that allowed USI to design diverse benefits plans with health care and ancillary products from program carriers while also earning credits towards the cost of the new benefits administration platform. With this partnership, Heinen's was able to find a frictionless, mobile-friendly process for handling benefits administration. The mobile friendliness of PlanSource's service offerings was the most critical factor in the reduction of friction in this process. With a vast number of in-field employees who may not have access to a corporate email or computer, mobile automation was the perfect medium of communication.

- Able to simply add guidelines HR creates into the PlanSource system
- Uses PlanSource's benefits report to audit and verify carrier invoices
- Mobile-friendly services allow a more streamlined communication of benefits

Results



2.3x faster processing time for administering life events



Higher plan participation rates with real-time enrollment reports and reminders



100% digital enrollment via online or mobile



Increased reporting efficiency with streamlined data integration and capabilities

