

# Worksite Communications

## Implementation Process

Worksite Communications' implementation process begins six to eight weeks before the enrollment start date to allow time for a successful case launch. A sample timeline is below, with a detailed timeline that is created during implementation.



### Case Kick-Off

- Dedicated Implementation Manager assigned
- Kick-off Implementation call to set project goals & expectations



### Implementation six weeks

- Weekly/Biweekly conference calls to discuss enrollment logistics
- Comprehensive case documentation using Basecamp, a secure project management website
- Comprehensive communications campaign created
- Communications finalized & delivery dates determined



### Pre-Enrollment

- Outreach to location contacts begins
- Communications distributed
- Employees schedule their appointment
- Benefit Counselor training



### Open Enrollment

- Benefit Counselors assist with enrollment
- Employee receives a printed or electronic confirmation form and completes enrollment assessment
- Case Manager provides enrollment updates to client
- Daily secure real-time application transmission



### Post Enrollment

- Wrap up call following the end of the enrollment period
- Enrollment Evaluation Report reviewed with team 4-6 weeks post enrollment

## TEAM RESPONSIBILITIES

### Worksite Communications

- Ensure project flows smoothly and meets timelines
- Host conference calls to discuss enrollment logistics
- Management of conference call agendas and notes
- Create enrollment schedule
- Assign licensed non-commissioned salaried Benefit Counselors
- Coordinate Benefit Counselor training
- Creation and deployment of communications campaign

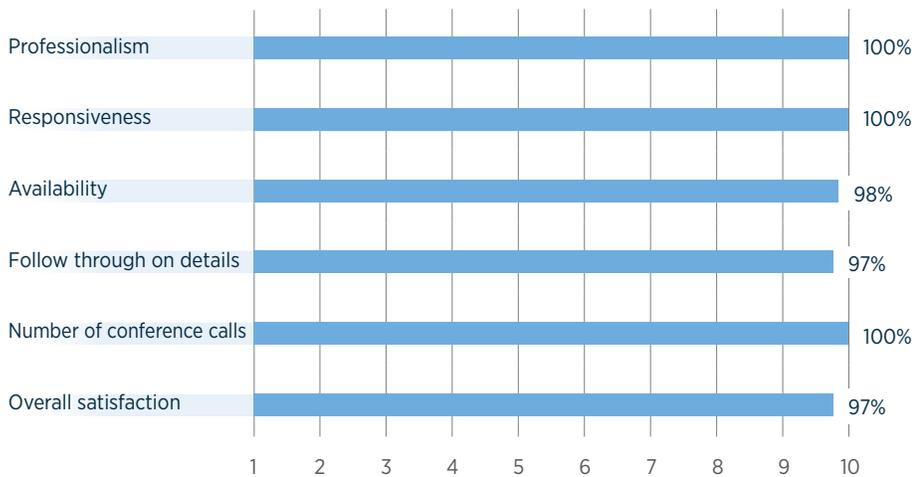
### Client

- Attend implementation conference calls to provide input and guidance
- Provide census file and location listing
- Provide special branding/logos
- Review and approve communications
- Notify location contacts of upcoming enrollment process

Note: The planning period may vary depending on the complexity of the project.

# Client Satisfaction Results

We asked **62 clients** to rate the following aspects of our implementation process on a scale from 1-10, ten being **Excellent**. The results speak for themselves:



## FACTS & FIGURES

# 2021 Survey Results

# 100%

Professionalism was rated at a satisfaction level of 100%

# 97%

Overall satisfaction with the implementation process

## “ What our clients are saying

“The Implementation Manager was communicative with all parties involved and did a great job pulling together meetings and agendas. I especially appreciate that they stayed on topic and managed the agendas during meetings in an effort to respect everyone’s time.”

“Everyone did a phenomenal job. They are very helpful and professional.”

“The Implementation Manager is organized, detail oriented and very efficient.”

