

GroupHEALTH

Customer Success Case Study



GroupHEALTH Boosts Optional Coverage Sales with Experlogix Document Automation Smart Forms

GroupHEALTH relied on a manual paper-based benefit enrollments process that had a negative impact on customer experience and was labor intensive and inefficient.

Challenge

GroupHEALTH printed and distributed enrollment packets to register their client's employees (enrollees) for company-supplied benefits. Enrollees laboriously completed the paper forms and returned them to their employers. The completed paper forms were sent to GroupHEALTH where the information was entered into a database.

The paper-based method was fraught with errors. GroupHEALTH employees and company benefits coordinators had to research and resolve missing or conflicting information, and in many cases, poor handwriting made it difficult to capture accurate data.

They realized that they could improve enrollee experiences and save money by implementing digital transformation techniques such as automation and intelligence. They called upon Experlogix Document Automation to help them solve these challenges.

Product

- Experlogix Document Automation

Benefits

- 5000% increase in sales of optimal coverage through Experlogix Document Automation Smart Form
- 20-25% reduced cost of managing enrollments
- Replace paper enrollment forms with guided digital forms
- Catch missing and conflicting information during enrollment
- Help employees receive coverage faster

Solution

GroupHEALTH implemented a modern solution based on Experlogix Document Automation's Smart Form technology. At benefit enrollment time, each client employee receives an email invitation with a link to relevant online enrollment forms. The Smart Form leads the enrollee through the online process, capturing all of the required information and resolving conflicting data in real time.

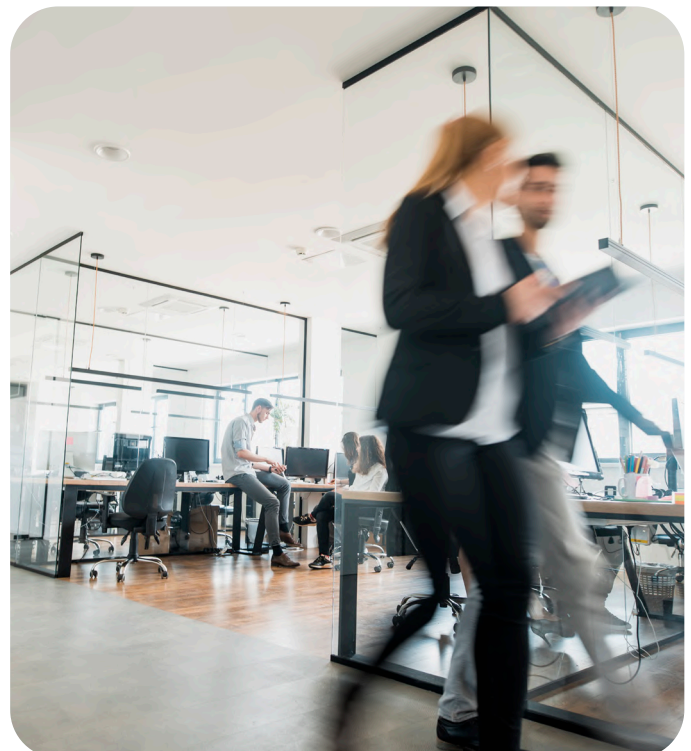
Experlogix Document Automation Smart Forms make use of known data to control information presentment. Unlike the generic paper forms, the online enrollment system no longer exposes enrollees to irrelevant content. This caused confusion in the past when enrollees mistakenly assumed their company plans included coverage not offered by their employers.

The online enrollment solution has reduced errors. GroupHEALTH is not required to read handprinted documents, and the system automatically prompts enrollees to supply missing information. The Smart Form notices inconsistencies, such as when an enrollee selects family coverage but neglects to provide information about their dependents.

Experlogix realized that they could assist GroupHEALTH even more by using their technology to aid the company in their efforts to sell optional coverage.

Under the old process, enrollees had to complete additional paper forms to purchase optional products. The forms required enrollees to submit much of the same information that they had already entered on the regular benefit enrollment forms. Predictably, sales of these products were quite low. Enrollees didn't understand the benefits of the optional coverage, or they ignored the forms completely.

In the online enrollment solution, employees watch a two-minute video that explains the advantages of the available optional coverage. The Smart Form computes the cost of the products based on previously acquired data and asks employees if they want to buy them through payroll deduction. Enrollees are not required to furnish any additional data to purchase the extra coverage.



Result

Compressed enrollment processing time allows GroupHEALTH to deliver a more satisfying customer experience, process more clients in less time during the busy open enrollment period, and ultimately get the enrollees their coverage faster.

The company estimates that, in just the first two months, they have reduced their cost to manage enrollments by **20% to 25%**.

The advantages of the online enrollment process based on Experlogix Document Automation Smart Forms have prompted GroupHEALTH to roll the solution out to all their divisions.

Plus, the Smart Form technology has eliminated one of the optional coverage sales barriers entirely: duplicate datagathering. The explainer video has addressed the other impediment: poorly communicated product benefits. This has increased sales of optional coverage by **5000%**. What was once barely registering on the books is now a contributing revenue source for GroupHEALTH and their brokers.



“Difficulty reading handwritten forms, like misspelling a member’s name, can impact the enrollees months later. A member might be denied drug coverage by a pharmacy if their name doesn’t match the insurance records. That causes unnecessary stress and creates negative customer impressions.”

Jim Moore
Chief Operating Officer

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