Enrollment postmortem

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WITH THE DUST of open enrollment season finally beginning to settle, brokers should begin taking stock of 2016. Many will look back on a mix of outcomes—enrollments that they considered successful and others they probably wish could be "do-overs." Most will use participation results as the basis for measuring their success—and rightfully so. While that's a great starting point, it can be just as important to gauge what did and did not work, particularly from a systems' capability perspective. Were you able to strike the right balance between client needs and the capabilities of the systems that were used, or were there unanticipated challenges behind the scenes?

It was common in the past, for example, for health care and voluntary benefits to be enrolled in separate environments. Based on survey participants in Eastbridge's 2016 *Market Vision™*

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The Employer Viewpoint report, today's employers prefer core and voluntary programs to be enrolled on the same platform. They also want more integration between their chosen systems and those of the carriers with which they work and more personalized enrollment communications for employees.

Another recently released Eastbridge report, *Enrollment and Benefit Administration Platform Providers: A Marketplace Review*, found that many platforms are evolving into "one-stop shops," bringing the services of enrollment and benefit administration together in one place. Reporting, employee self-service and carrier data transfer, as well as the ability to enroll core and voluntary coverages, are all becoming more common capabilities in the market. Most platforms will even accommodate custom communication and educational web materials to aid in the personalization that employers are seeking.

The essence of enrollment is not about technology or process; these are just the means to an end. Rather, the key is motivating an employee to buy. Creating better alignment between the systems that support enrollment and the needs of the client is likely to improve your chances of getting employers to allow more and better access to employees. So as you evaluate your 2016 enrollment results, remember to look beyond just participation, and measure satisfaction in all areas.

Enrollment Process and Platform Preferences

(Scale: 1 to 5, with 5 being "Strongly Agree)	Percent rating 4 or 5
Statement	**2016**
We would like our employees to have personalized enrollment communications based on their age, gender or life-stage	72%
We would prefer to enroll all products on one platform even if the products come from different carriers.	62%
We would prefer that our online enrollment be a part of our benefits administration system rather than a sepatate enrollment system.	54%
We would prefer to offer our employees various types of enrollment and allow them to choose which one is best suited for them.	30%