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TARGETED EMPLOYEE ENGAGEMENT  
customize the conversation @



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## Targeted Messaging using Health Personality Segments

Leveraging psychographic profiling  
and behavioral science to enhance  
benefit communications and  
employee satisfaction.

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Increase engagement in employer-  
sponsored benefit programs, especially  
with respect to employee and family health.

# CASE STUDY

## CORE + VOLUNTARY BENEFIT ENROLLMENT

### EMPLOYER PROFILE

- 4,400 Benefit Eligibles:  
77% female / 23% male
- 500+ offices; serving over 1 million patients yearly
- 5 Health Plan Options
  - 3 self-funded PPOs and
  - 2 fully-insured HMOs

### OPEN ENROLLMENT PROJECT GOALS

- ✓ Increase health plan enrollment
- ✓ Steer employees towards the Silver and Bronze PPOs and away from the Gold PPO and HMOs
- ✓ Increase voluntary benefit enrollment
- ✓ Reduce turnover (*health plan enrollees turn over less frequently*)

### PROJECT ELEMENTS

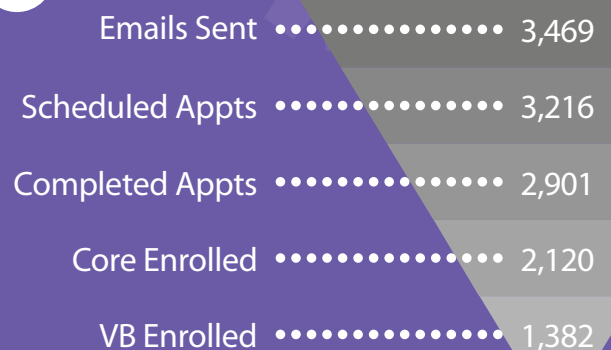
- Psychographic messaging and scripting used to tailor team member enrollment experience
  - Personalized emails and texts
  - Personalized counselor scripts and counselor Health Personality training
- Active enrollment vs. passive enrollment in previous years
- Counselor-assisted enrollment vs. manual enrollment in previous years
- Attractive payroll deduction pricing

### RESULTS

- 16%↑** increase in email click-through rates\*
- 42%↑** increase in email view-to-submission rate\*
- 32%↑** increase in actual vs. expected appointments
- 15%↑** increase in health plan enrollment

- 40%↑** increase in the number of employees enrolled in employer preferred medical plans

**12%↓**  
decrease in employer's medical spend PE/PY



- 520%↑** increase in the number of voluntary benefit participants

\*Compared to general group messaging