



Gallagher

Insurance | Risk Management | Consulting



# Boosting employee participation and enriching benefits amidst M&A

## CASE STUDY

A recent acquisition and upcoming annual enrollment provided an important opportunity to leverage concierge education and training so all employees (existing and new) could make informed benefit decisions.

### Client Profile:

**Industry** — Mental Health

**Niche** — Nonprofit 501c3

**Employees** — 1,700+

**Geographical Region** —  
Nearly 30 locations  
in Oklahoma

### CURRENT BENEFIT SITUATION:

Due to the high demand for mental health services, and despite a national shortage of providers, the client was experiencing rapid growth organically and through Mergers & Acquisitions (M&A). The most recent acquisition included over 200 new employees who needed a warm welcome and education on their new benefit offerings. Additionally, the client needed a clear vision for the future as their existing plan was fragmented and lacked coherence. There were different carriers for life and disability, different plan years for dental vs. medical and outdated voluntary benefit plans, which ultimately led to confusion and low participation from employees.

To address these challenges, the immediate focus was to provide one-on-one benefit education to employees, ensuring they were well-informed about the enhanced range of benefits available to them. The client also wanted to introduce a Permanent Life with Long-Term Care (LTC) program, provide technology training and facilitate clear communication about the newly implemented Employee Assistance Program. The initiatives aimed to empower employees to access their key benefits that would directly impact their wellbeing.

Looking ahead to annual enrollment and ongoing support strategies, their HR team was interested in concierge new-hire services, re-branded communications, benefit harmonization for merger partners and ensuring all employees had access to benefit education.

### THE RESULTS:

Gallagher Enrollment Solutions (GES) provided an off-cycle enrollment for the new acquisition group, ensuring the successful onboarding of all new employees. Concurrently, a focused education and communication campaign was launched for both new and existing employees about the enhanced programs. Several months later, GES extended the same high level of one-on-one support during the client's annual enrollment period, resulting in nearly 90% of all benefits-eligible employees taking advantage of the educational and enrollment resources.

**Of the 609 employees who completed the assessment survey, 91% strongly agreed that “they had a better understanding of their benefits after meeting with a GES benefits counselor and that they found the one-on-one session to be valuable”.**

More than 750 employees elected to participate in the Universal Life with LTC benefit, which provided guaranteed issue protection for the employees and their families. Carrier credits were negotiated to help offset the cost of technology integration and building new plans on the system of record, ensuring a streamlined enrollment process.

The HR team reported that they were pleasantly surprised on how “quiet” annual enrollment was this year, given that past years have left the staff scrambling to onboard new employees and an inundation of service calls. With the support of GES's in-person education and new hire concierge services, HR/Payroll/Administration staff were given back vital time and resources to focus on their people without having to hire additional personnel.

# Gallagher Better Works<sup>SM</sup>

<b>Physical &amp; Emotional Wellbeing</b>	New and existing employees were provided with focused education on their EAP. That level of guidance not only boosts utilization in wellbeing programs but also helps remove some of the stigmas that may deter individuals from seeking assistance in vital areas of their overall health.
<b>Financial Wellbeing</b>	The new Universal Life Insurance with LTC rider provided access to asset protection for individuals and their dependents. That type of hybrid plan ensures beneficiaries are covered in the event of a loss and living benefits are available to help offset expenses associated with LTC.
<b>Career Wellbeing</b>	By providing the opportunity for employees to better understand their comprehensive benefit package and make informed choices for their families, it demonstrated the employer's care. The key to any organization's ability to attract and retain their employees is showcasing genuine concern for their people.
<b>Organizational Wellbeing</b>	Having a trusted partner responsible for managing the intricacies of education and enrollment for this large group, freed up the HR staff to focus on key areas of growth without having to hire additional personnel.



Gallagher understands that our clients' needs are always changing and that we must be able to adjust strategies. We know that the whole person comes to work every day and we help employers support their people's total wellbeing. Together, we listen, grow and improve to foster the best employee experience.

Contact your Gallagher consultant today to learn more about how **Gallagher Enrollment Solutions** can empower your employees to make informed decisions through thoughtful communications and engagement strategies.

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