

Successful shift from paper to online enrollments



Client profile

- 164 employees
- Teachers and staff
- Previous enrollments were on paper

Did you know?

Sun Life can enroll a Client's entire benefit suite – including medical from other carriers – working with almost any platform. Our own online enrollment solution also provides the ability to enroll new hires every month.



Challenge

Client wanted to transition from paper but they were behind on their scheduled HRIS implementation. They also needed to educate teachers and staff on a new medical plan as well as Voluntary benefits – while being mindful of their classroom obligations.

Strategy

- ✓ Leveraged Sun Life proprietary platform for online enrollments
- ✓ Trained the HR team on the platform in order to answer employee questions
- ✓ Scheduled mandatory group meetings led by a Sun Life Benefit Counselor (BC) during a teacher in-service day; BC and broker representatives remained on-site to answer any questions
- ✓ Ensured teachers could self-enroll via laptops immediately following the group meeting – either in the same location as the group meeting or individually at their desks
- ✓ Allowed for a four-day enrollment – Friday through Monday – to ensure timely decision-making

Results

Over 80% of employees enrolled online over the course of four days



Success

Benefit to employee: Easily able to make online elections and provided the opportunity to learn about the benefits and ask questions.

Benefit to Client: Previous enrollments were on paper. Using Sun Life's proprietary platform with group meetings removed a significant portion of the HR burden from their annual enrollment process – and improved employee data integrity.

To learn more, contact your broker or Sun Life National Accounts Employee Benefits Representative.



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