

## Case Study: Full Capabilities – Enrollment, Communications & Engagement, Direct Billing

### Company: Mechanics Union

The largest Mechanics Union in the United States represents auto and truck mechanics, body shops, heavy equipment mechanics, bus mechanics, excavating and paving, road building forklifts, fleet service mechanics and more industry mechanics.

In late 2015, Homeland HealthCare, LLC (Homeland) partnered with the Mechanics Union to execute an Open Enrollment for voluntary benefits for a segment of their union participants, which represented 6,000 lives. The union wanted to offer the participants and their eligible dependents several voluntary products.

To execute this program, the union and Homeland faced several challenges:

- The union participants were hard to reach, as they had busy work schedules.
- The union had limited email addresses and phone numbers for their participants.

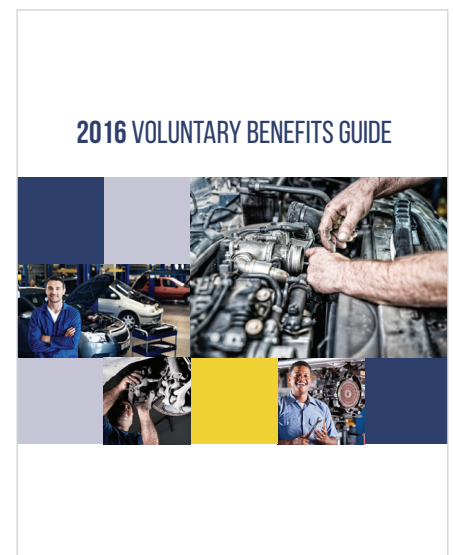
### The Solution

Homeland negotiated benefits with several carriers and managed the enrollment process. Participants were offered accident insurance, short-term and long-term disability insurance, life insurance, critical illness insurance and value-added programs. Homeland's scope of services included:

- Collaboration with the union administrator to plan enrollment details
- Development of a communication plan to engage the union participants
- Setup of the enrollment platform
- Collection and remittance of premiums – direct pay billing
- Inbound and outbound call center platform
- Perpetual enrollment communication for new participants

### Enrollment

The enrollment period took place over two and a half months. During Open Enrollment, Homeland's Benefit Advisors educated participants (inbound and outbound call campaign) about the available products and assisted them with enrollments via an online enrollment platform. Homeland encouraged participants to set appointments to speak with a Benefit Advisor to accommodate their busy work schedules.



## Communications & Engagement

Homeland developed a communications program to educate union participants about the voluntary benefits.

- Landing Page – housed the enrollment materials
- Endorsement Letter – to announce the partnership between Homeland and the union, as well as provide information on the program
- Emails – deployed throughout enrollment, including reminders and product-specific messaging
- Direct Mail – flyers which provided an overview of the benefits
- Benefit Guides – provided details on the benefits
- Customized call center messaging – tailored for the union

All communications were co-branded. During Open Enrollment, metrics were used to track the program's success. Frequent touch base meetings were scheduled with the union administrator to re-evaluate and adjust the communication to maximize program participation.

Landing Page

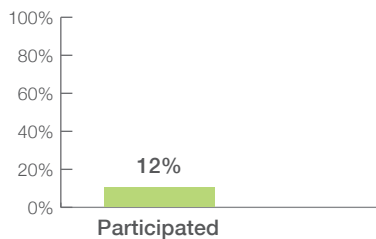
## The Result

Homeland provided a comprehensive approach to drive a successful benefits program for the union.

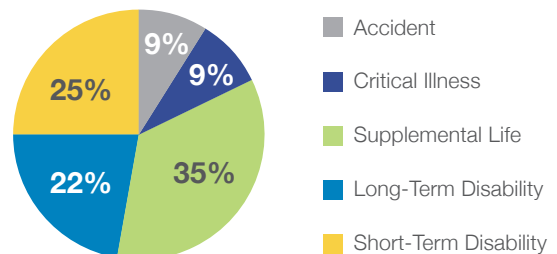
- The inbound/outbound enrollment – 12% of union participants enrolled in voluntary benefits.
- Benefit Advisors made 25,139 outbound calls to union participants.
- Benefit Advisors received 1,460 inbound calls from union participants for counseling on the available products and online enrollment.
- Each participant enrolled in an average of 2.5 products.

### Overall Participation

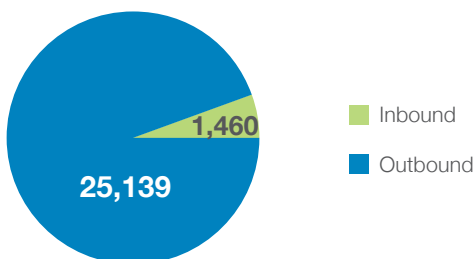
Participants with Valid Phone Number:  
**4,797**



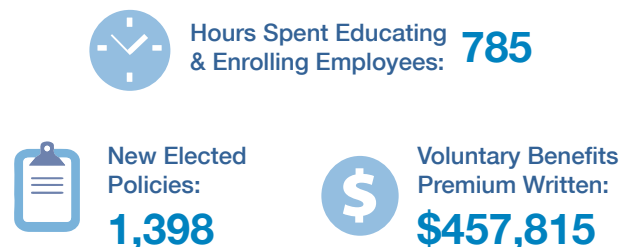
### Participation By Plan



### Inbound & Outbound Calls



### 2015 Enrollment Results



Data is based on analysis of enrollment data as of January 2016.