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ACCELERATE

Trustmark 

Case study: Making yourself indispensable to clients

Creating true solutions for one Chicagoland manufacturer



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Today we'll cover...

Agenda

- Company & industry profile
- Where we were, where we are, and where we're going
- Importance of top-down buy-in
- Don't know what you have until it's gone
- What does enrollment look like today?
- What we've learned

About the company

Chicagoland manufacturing company

- Offers customer solutions for transmission, remanufacturing, machining, electrical and motorsport services
- 1,200 employees
- Long-tenured employees, low turnover, comprised of many legacy families



About the industry

- Comprised primarily of line workers
- Communication is notoriously difficult in this industry
- There's pushback when trying to get everyone to meet with the benefits counselor



“ Time is
production.

Production
is revenue.

What did open enrollment look like before?

- HR was very paternalistic with enrollment
- 10-20 group meetings over the course of 2-3 weeks (onsite)
- 2-3 weeks of HR sitting in conference rooms waiting for employees to come in and enroll
- Wrote forms out for them rather than using their systems



This HR headache wasn't sustainable...



With all that in mind...

How do we maximize enrollment participation?

- What did our solution look like?
- How did we get employees to enroll without sacrificing time off the line?
- How did we help them better communicate to their employees?



The importance of top-down buy-in

Buy-in is critical for success

- Senior leadership, inclusive of HR, had to shift the way they were used to doing things
- Sustainability long-term with company growth model being aggressive
- HR needs time freed up to align with the company growth model



How we responded

Built a strategy to meet their needs

- Brought in an enrollment firm partner (with carrier/HR/benefits counselors)
- Conducted on-site training for 2 days to learn their process
- Created 1-1's for the employees and benefit counselors
- Internal surveys to determine the comfort of the process
- Became a true partner, now engrained in their culture



How we responded

Streamlined existing processes

- Provided HR with scheduling tool
- Billing processes
- Helped employees get time back to focus on other important tasks



Don't know what you have until it's gone

The importance of a partnership

- New broker came in claiming they could help save on medical, opting to bring in new enrollment team
- Over-promised and under-delivered



“ Within 6 months, we were back in talks.

BORs came through within 7 months.

What does enrollment look like today?

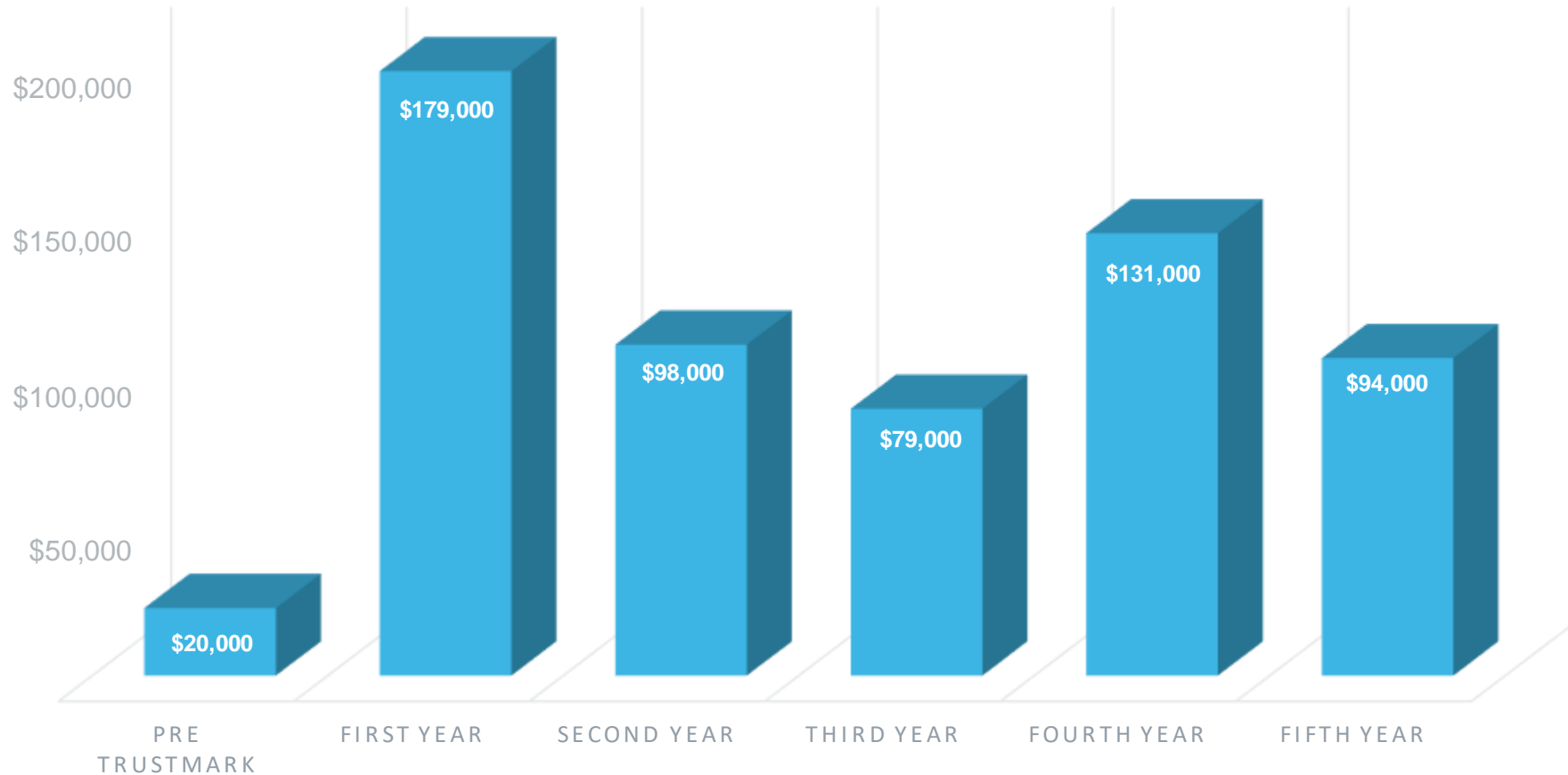
COVID & new approach

- Seamless transition to call center
- Not “mandatory” but “strongly encouraged” enrollment
- HR managed scheduling tool to reduce time off the line
- Private booths for counselor calls



**When you offer them
a seamless experience,
it's harder for employees
to say no.**

Annual enrollment: New premium by the numbers



What does enrollment look like today?

How does it look for Trustmark?

- Paid premium in 2023 was \$450K
- Employees are engaged
- We have the company's full confidence to execute a successful enrollment



Survey results

- ✓ Employees highly satisfied
- ✓ Feeling valued by the company
- ✓ Job satisfaction
- ✓ Company culture

“

*Wow, they're really
our partner, not
just our vendor*

”

What we've learned

- Hands-on enrollment creates “sticky” relationship
- Create solutions that fit the needs of both the industry and the employee's unique situation
- Build partnerships, don't be just another vendor
- Rate alone won't win you business



Thank you!

“

How'd
we do?

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