PC24

Trustmark
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ACCELERATE

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Stacking the deck for enrollment success: Case set up and employee marketing

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"IF I HAD SIX HOURS TO CHOP DOWN A TREE, I WOULD SPEND THE FIRST FOUR HOURS SHARPENING THE AXE."

ABRAHAM LINCOLN

Today’s conversation

1. Positioning your cases for success prior to the sale
2. Tips for marketing communications that drive results
3. Roadblocks to a successful implementation and how to get around them

Think about the most successful enrollment you've ever had.

What made it great?

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Laying the groundwork for your case prior to the sale

We're all familiar with the challenges we face

A changing enrollment environment

- Growing reliance on self-service
- Crowded benefits landscape
- HR and leadership with competing priorities

What do we need to accomplish?

Minimum requirements

- Targeting 50% of eligible employees to make a decision – Yes/No
- After this, a minimum of 10 employee applicants
- But you'll struggle to get even that with:
  - Passive online self-enrollment
  - Hand-raising

You need to set yourself up for success with the right approach!

What works?

Getting the employer's buy in

- These aren't "set it and forget it" products
- We need support to deliver effective communication
- The outcome of the program depends on the backing of HR

What works?

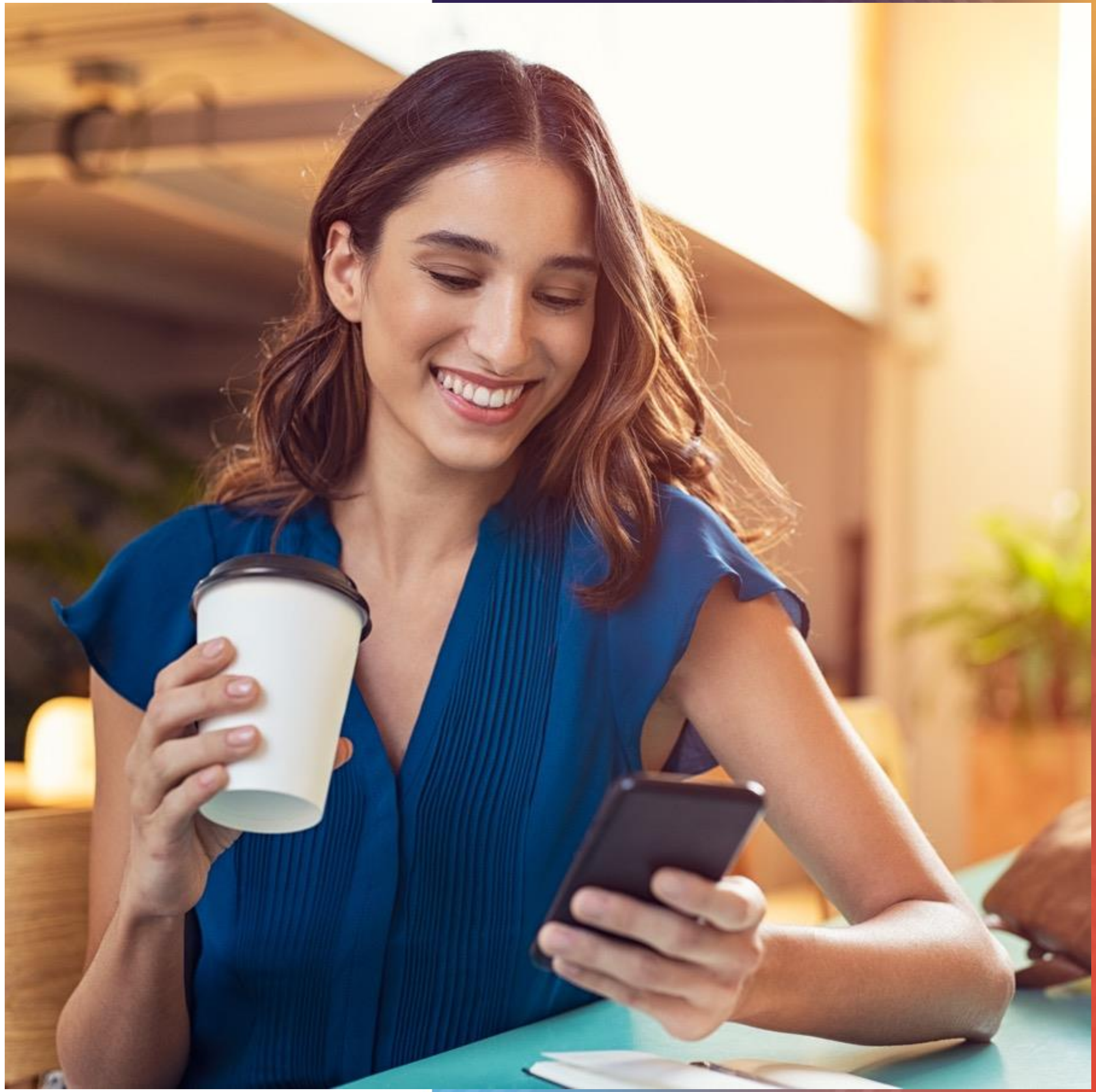
Positioning the enrollment

- Enrolling with an experienced enrollment entity
- Off-cycle enrollment
- Being able to educate / engage the employee about the offer that's available for them & their family

What works?

Providing the right communication

- Endorsed communication from the employer
- Highlight the “new benefit offering”
- Group meetings with follow up email, text, internal office messaging
- Encouraging employees to schedule an appointment



How do we deliver that communication?

You want to get the word out, but *how?*

How do I manage the timeline?

How do I align with employer branding?

How do I create materials?

How do I communicate the plans?

How do I distribute the materials?

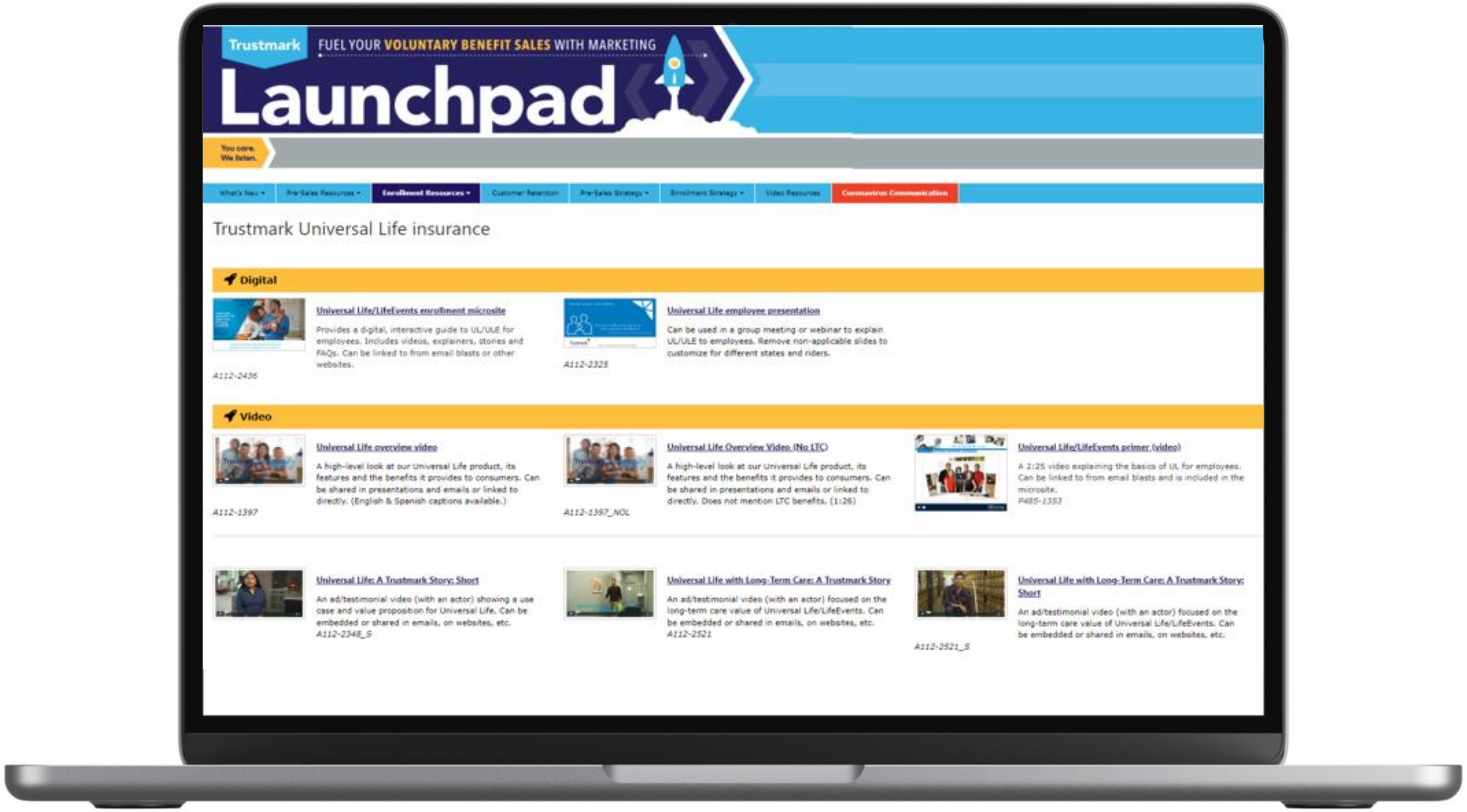
Trustmark marketing is your *how*!

Pre-approved marketing communications

On-demand materials ready for implementation

- ✓ Approved DOI communication collateral
- ✓ Product communication templates
- ✓ Co-branded options on select collateral
- ✓ Product videos
- ✓ Product microsites
- ✓ Employee product presentations

Executing your pre-sales strategy:
Easy access to materials through launchpad



Trustmarkins.com/launchpad

SCAN ME

Tailored communications: Greater customization may be needed for large cases

- Communication for a diverse workforce
- Support client’s corporate culture
- Compliance and policy communications alignment
- Showcase the client’s brand

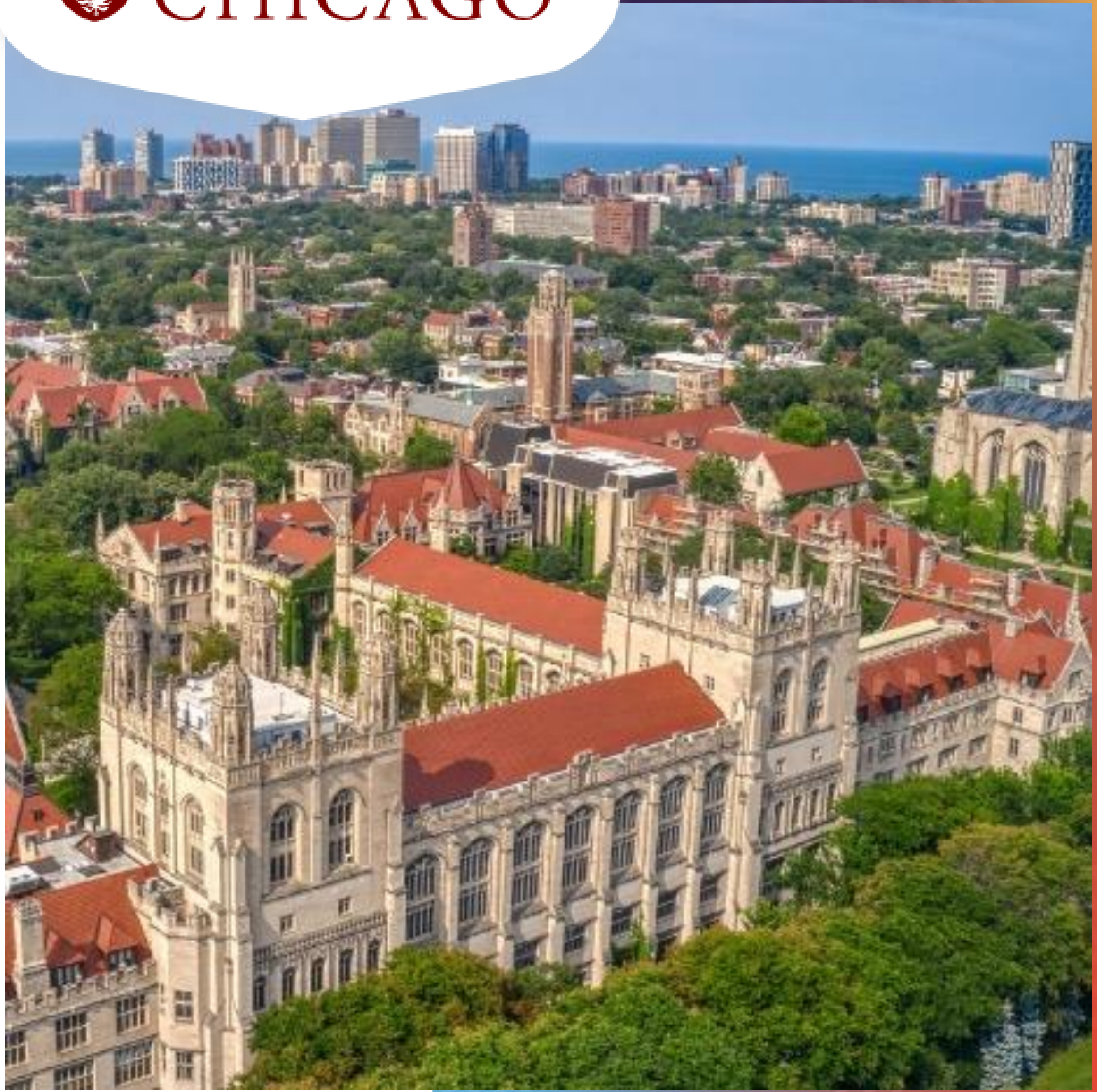
THE UNIVERSITY OF CHICAGO

Collaborating with Trustmark: Exploring a large case

Challenge: Managing a diverse workforce spread across multiple buildings on campus.

HR Objective: Establish a robust brand presence on materials to endorse products.

Opportunity: Develop a comprehensive campaign with a multi-touchpoint plan to effectively reach the target audience in various locations.



Collaborating with Trustmark: Exploring a large case

THE UNIVERSITY OF CHICAGO

Postcard

Benefit summary
LTC collateral

Collaborating with Trustmark: Exploring a large case

THE UNIVERSITY OF CHICAGO

TV monitor

Landing page

Experience the Trustmark difference: Elevating services, exceeding expectations

1. Proven leadership in enrollment marketing communications
2. Effective communications tools
3. Consultative-approach marketing
4. Turn-key solutions for fast implementation for most cases

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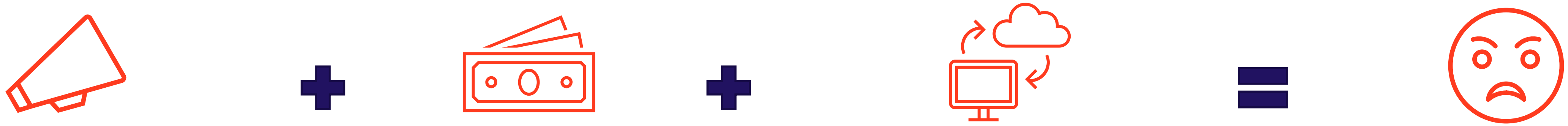
Case set up for success

What comes next?

- You've sold the case, you've got the employer onboard
- You have a marketing strategy and the tools to execute

But what happens if we stumble at the finish line with case set up?



Communication breakdown + Billing issues + File feed/application issues = Poor client outcomes

Understanding the challenge

What's the threat?

- Brokers working with multiple carriers, multiple people
- Disorganization and lack of specialized expertise
- Lack of clear timelines
- Inconsistent communication

Your dedicated implementation team

Producer partner

Implementation Manager

- Licensing / Commissions
- Case Underwriting
- Marketing Communications
- Enrollment Support
- Enrollment Technology
- Billing Services Payroll Deduction/ACH

The Trustmark timeline

CASE SOLD	60 DAYS OUT
Kickoff call	55 DAYS OUT
Billing call	50 DAYS OUT
Single Case Agreement/Advance Agreements are signed	40 DAYS OUT
Employer provides census	20 DAYS OUT
Enroller Training	20 DAYS OUT
Employer Agreement is signed	12 DAYS OUT
Ben Admin case build is released	5 DAYS OUT
ENROLLMENT STARTS!	0 DAYS OUT

Key takeaways

Preparation = Success

- We want to drive positive outcomes for your cases
- We can do that by setting up for success on the front end by:
  - Product positioning with the employer
  - Dedicated customer success team to support success
  - Marketing to drive results

Thank you!

“How’d we do?”