

The Tale of Two Enrollments



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**“Mistakes are the
portal of discovery.”
- James Joyce**



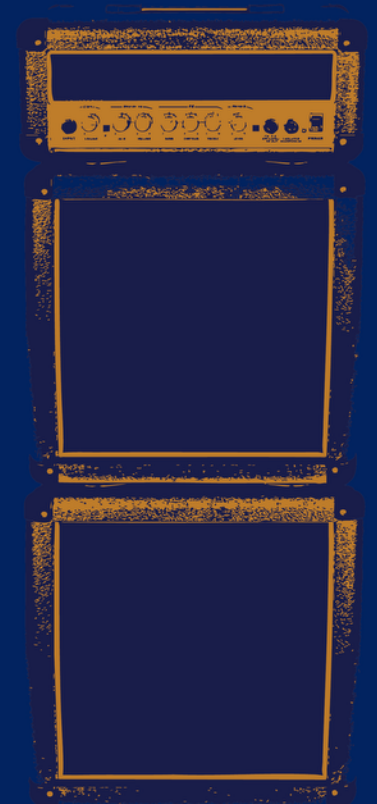
Today's Tales

Tale One: The Enrollment That Could Have Been

- Company & Industry Profile
- In the Beginning...
- The Storm Is Brewing...
- Lightning Strikes...
- Results

Tale Two: The Enrollment That Was

- Company & Industry Profile
- In the Beginning...
- Sunny Summer Days...
- Results



AMPLIFY



Tale One

The Enrollment That Could Have Been...

About the Company & Industry

- Manufacturing industry
- 1,000+ lives
- Highly engaged HR team
- Buy in from company CEO



In the Beginning...

March – May 2024

- Wanted to bring in Universal Life with Long-Term Care
- Want on-cycle enrollment (1/1) due to minimal changes in medical plans and contribution schedules
- Invested in a strong communication plan:
 - Email campaign with 3 touchpoints
 - Product webinars
 - Active enrollment via ben-admin and Simplink connection
 - Call center support



Proposed Timeline

Communication	Date	Message
Email 1	10/15	"Trustmark is coming..."
Enrollment period begins & Call Center opens	11/1	"Ask us anything!"
Email 2	11/3	"Enrollment has started..."
Webinar #1 (AM Session)	11/3	"Understand Life with Long-Term Care..."
Webinar #2 (PM Session)	11/10	"Understand Life with Long-Term Care..."
Email 3	11/13	"Last chance!"
Enrollment period ends	11/15	"Enrollment has ended..."

The Storm Is Brewing...

June 2024 – Organization Decides To Move Benefit Administration to Payroll Provider's Platform Which Is Unable To Host Permanent Life Plan

- Decision made to build Universal Life and Long-Term Care on Selerix via link and launch from payroll provider ben-admin
- Identified additional communication needed to inform and prepare employees for separate login and credentialing



Lightning Strikes...

September 2024 – HR Directors Resigns

- Replacement for HR Director takes 5 months
- Enrollment expected to continue, but communication with employer is becoming more difficult



Lightning Strikes...Again

October 2024 – Concerns About Delays Arise

- Concerns from employer about readiness of payroll platform
- Employer decided to move to passive enrollment to minimize platform issues, despite indications that it will likely result in lower employee awareness and engagement



Open Enrollment Begins

November 2024 – Enrollment is Off and Running



Results

Despite Our Best Efforts...

3.5%
Participation

Only received 35 applicants out
of an eligible 1000

\$20,000

Only \$20K in premium
generated



“I wish we would have waited until they were ready to do it right”

– Producer

A photograph of three women in a meeting. Two women are giving a high-five, both smiling broadly. A third woman is seated in the background, also smiling. They are in a modern office setting with a wooden table, a laptop, and a coffee cup.

Tale Two

The Enrollment That Was...

About the Company & Industry

- Manufacturing industry
- 550+ lives
- Leadership across the board (HR, C-suite) was highly engaged
- Great low to no-cost technology – Selerix was introduced
- Paternalistic by nature



In the Beginning...

March – May 2024

- Wanted to bring in Universal Life with Long-Term Care
- Wanted to pursue on-cycle enrollment (1/1) due to minimal changes in medical plans and contribution schedules
- Invested in strong a strong communication plan
 - Email campaign with 3 touchpoints
 - Product webinars
 - Active enrollment via Selerix
 - Call center support
 - Employer was very supportive of coordinating one on one meetings for employees and benefit counselors



Proposed Timeline

Communication	Date	Message
Email 1	10/1	"Trustmark is coming..."
Enrollment period begins & Call Center opens	11/4	"Ask us anything!"
Email 2	11/4	"Enrollment has started..."
Webinar #1 (AM Session)	11/5	"Understand Life with Long-Term Care..."
Webinar #2 (PM Session)	11/12	"Understand Life with Long-Term Care..."
Email 3	11/13	"Last chance!"
Enrollment period ends	11/15	"Enrollment has ended..."

Sunny Summer Days...

June 2024 – Enrollment is Looking Promising

- Everyone is aligned on proposed timeline
- Still showing strong buy-in from HR and CEO



Ready for the Enrollment

September 2024 – Enrollment Materials Started

- Enrollment materials are in flight / on-track
- HR & CEO are excited for enrollment!



Open Enrollment Begins

November 2024 – Enrollment is Off and Running!



Results

Using the Same Strategy as Case 1...

44%
Participation

Received 242 applicants out of
an eligible 550 employees

\$150,000

\$130K more in premium
despite almost half the
employees as case 1

Tale Three

Hitting the Reset Button on Case 1



In the Next Chapter...

October 2025 – Getting It Right

- Manufacturing client wants to get it right
- New HR & CEO both on board

Re-enrollment strategy planned:

- Off-cycle enrollment in March 2026
- Re-running original communication plan
- Active enrollment via Selerix with Call Center support



Key Takeaways

- Even the best strategy can face challenges when unexpected factors arise on the employer's side—flexibility is key
- Internal delays, shifting priorities, or leadership changes can influence outcomes despite strong execution
- Success depends not only on the strategy itself, but also on the employer's readiness and engagement

Thank you!

