

PC26

Trustmark
Producer Conference
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AMPLIFY

Trustmark 

Tech for Life & Care Solutions: Striking the Right Chord



Marc Foremsky
Consultant, Area Vice
President
Gallagher

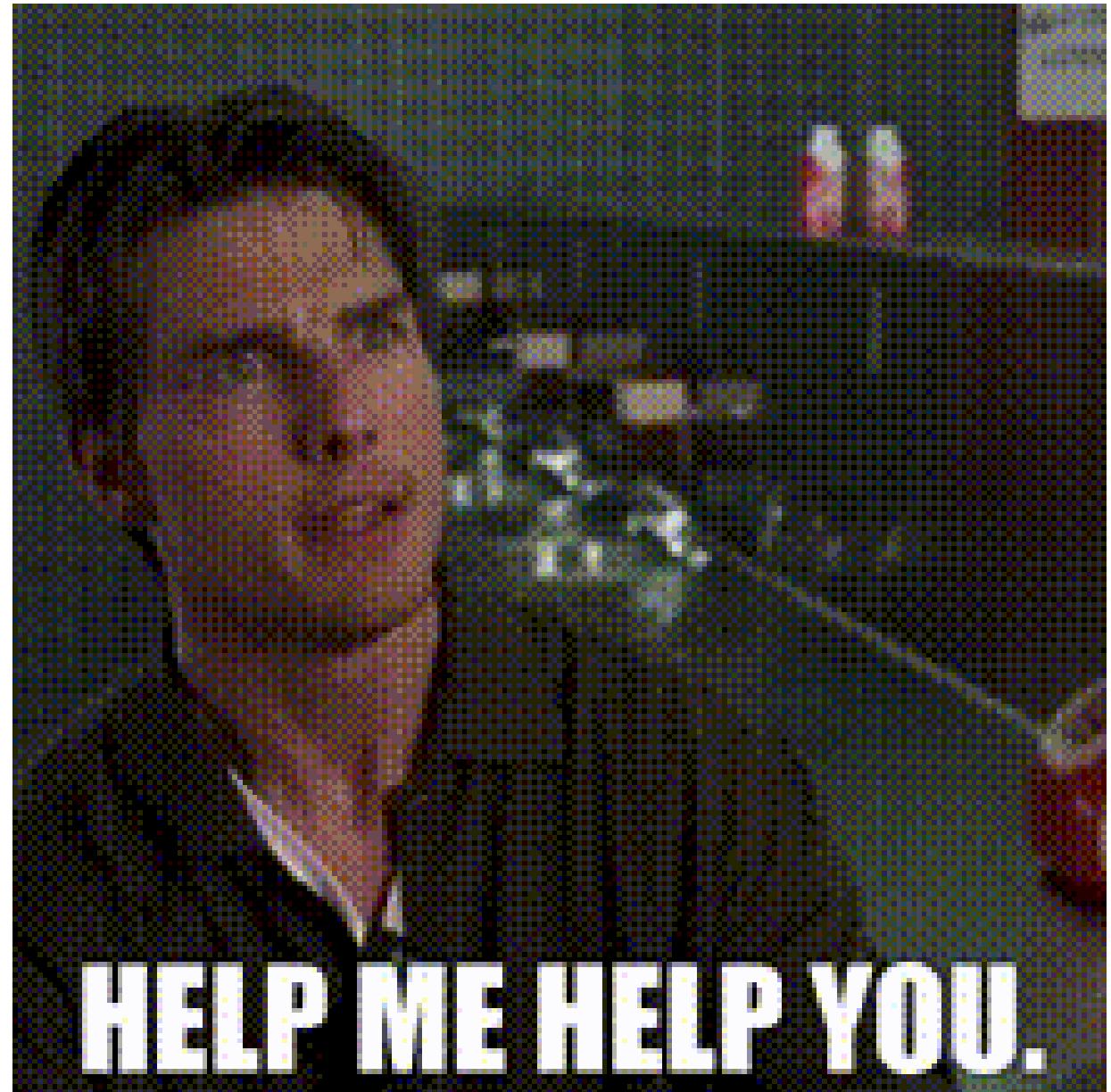


Kraig Sexton
Regional Sales Manager,
Great Lakes
Trustmark Voluntary Benefits



Matt Myers
Regional Sales Director,
Mid-Atlantic
Trustmark Voluntary Benefits

**What is the #1 tech
consideration for you and
your clients when it comes
to offering Permanent Life
and Long-Term Care
solutions?**



Agenda

1. Navigating Client Conversations and Creating a Solution for the Best Outcome
2. The Biggest Tech Considerations for Your Clients
 - a. Technology options, client priorities, producer perspective
3. What Are the Tech Options? How Do I Strike the Right Chord?
 - a. On/off-cycle vs. on/off platform, employee engagement





Navigating Client Conversations

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Approaching Your Clients About Enrollment Tech



- Start with understanding the goals of the enrollment to determine best tech strategy
- Questions to ask:
 - What are your objectives?
 - What's the main benefit you're looking to provide?
 - What products are you looking to offer?
 - Would you consider an off-cycle enrollment?
 - How do you engage employees for your other benefits?
 - Active vs. passive?

Navigating Enrollment Tech With Your Clients



- Consider enrollment success from an engagement, communication, and education perspective
- What client hurdles may you run into when it comes to enrollment tech? How can you navigate them?
- When might you consider walking away from an opportunity?
- Tailor your conversation/strategy based on group size, industry, workforce demographics, etc.



Technology Considerations

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Here's What We've Heard

Common Challenges

- Inability to work with an employer's platform
- If a carrier can fit the system, they may not offer the best products
- Multiple enrollment systems
- Keeping data in sync
- Poor user experience and employer headaches



Enrollment Technology Priorities

Brokers

- Fewer data challenges
- Streamlined administration process
- Flexibility to offer products on a wide range of systems
- Ease of doing business

Employers

- Positive enrollment experience
- Simple for employees to use (mitigate questions/frustrations)
- Offering benefits that employee's value
- Ease of doing business



Tech Options With Trustmark

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Selerix

What Is It?

- Pioneer in natively hosting permanent life products
- Connects to other web-based enrollment platforms
- Customizable user interface
- Enroll Trustmark products with no technology cost

When To Use Selerix

- Need to solve for complex product builds and/or eligibility groups
- Short build time allows for deployment in as little as 10 business days
- Trustmark license can be utilized to build out other lines of coverage such as medical, dental, vision, basic/supplement life, disability, etc.
 - One or more Trustmark lines of coverage must be offered
 - Build of the non-Trustmark lines handled by a third party of your choice

Simplink

What Is It?

- Trustmark's API that allows Trustmark products to be offered on most ben admin systems
- Currently connected with ~30 platforms including Employee Navigator, bswift and platforms that white label bswift such as Paycor and Paylocity
- A turnkey, no-cost solution
- Mimics the look and feel of the existing ben admin system
- Fewer challenges
 - Cleaner data
 - Eliminates EDI feeds
 - Part of implementation

When To Use Simplink

- Seeking full functionalities permanent life without putting permanent fixtures on the platform
 - Simplink can account for
 - Issue Age rating
 - Stacking
 - EOI and attestations
- For a permanent life solution when time and resources don't support a product nuanced build
 - Minimal product build on agency tech team or technology licensee
 - No census needed — employee demographics are pulled directly from the host system

Trustmark Enroll For Life™

What Is It?

- A self-service permanent life and long-term care enrollment platform
- Designed to help brokers and employers:
 - Engage employees
 - Streamline administration
 - Boost benefits participation
- Designed to be self-directed but also offers call center and chat capabilities

When To Use Enroll For Life

- A self-directed solution is needed for down market clients
- Focusing on employee engagement and awareness without draining resources
 - Platform can send emails and/or text messages to create awareness and situational follow up messaging to non-respondents.

Native Builds

Trustmark's Process

- Assessment of platform's capability to host a Trustmark product
- Provide a playbook
 - Takes approximately 1 week
- Conduct a walk-through
- Lead time for build depends on the timeframe required by the vendor

When To Do a Native Build

- When there is a need for a single platform solution
- Where there is a willingness to make product modifications to align with platform capabilities
 - Limited benefit tier options
 - Guaranteed Issue amounts only

Key Takeaways

- Understand your client's tech challenges to successfully offer permanent life and care solutions
- Technology solutions are not one size fits all
- Trustmark has a variety of tools to make offering our life and long-term care products a breeze

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Thank you!

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