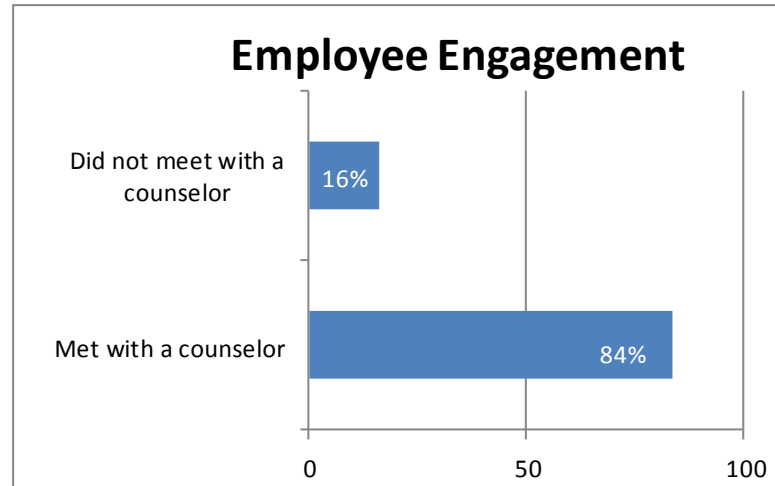


The Outcome

Averaged between both phases of the enrollment, over 84% of employees completed an individual interview with a benefit counselor.



Did you know...

EOI's experience suggests that a 70% or greater level of engagement effectively translates into an agreeable spread of risk for most voluntary insurance offerings.

The chart below summarizes the enrollment results, by phase, per product.

Product	Phase I		Phase II		Total	
	Applications	Premium	Applications	Premium	Applications	Premium
Accident	499	\$143,572	264	\$71,249	763	\$214,821
Hospital Income	54	\$38,539	3	\$2,211	57	\$40,750
Short Term Disability	516	\$163,414	339	\$96,532	855	\$259,946
Universal Life	789	\$253,910	404	\$141,574	1,193	\$395,484
Total	1,858	\$599,435	1,010	\$311,566	2,868	\$911,001

About EOI

For more than 33 years, EOI has helped over 1,500 employers increase the effectiveness of their employee retention strategy by promoting their existing core and voluntary benefit offerings. We are appointed and licensed to capture insurance applications in all 50 states with offices in California, Chicago, Colorado, and New York.

For more information about this case study or general information about EOI Service Company, Inc. please contact Jim Davidson, at jdavidson@eoiservice.com or (714) 656-3303. Also, please visit us on our website at www.eoiservice.com.



Results Driven. Goals Achieved.

EOI Business Partner

May 2013



Case Study

Client Profile

EOI Business Partner

“EOI Business Partner, a performance marketing company for brands that are passionate about keeping and growing customers. Our data-driven approach combines the right tools, strategies and resources to help brands get the most out of their customer relationships. And our Continuous Engagement ImprovementSM process is proven to transform customer service touch points into powerful relationship and brand-building tools.”

Name	
EOI Business Partner	
Locations	
10 locations; headquartered in Indiana	
<ul style="list-style-type: none"> Arkansas Florida Indiana 	<ul style="list-style-type: none"> Iowa Louisiana Missouri
Industry	
Call Center	
Number of Employees	
2,200 at time of initial enrollment 84% non-exempt/16% exempt	

Gender Analysis	
Female	64%
Male	36%
Age Analysis	
Average	33
Median	29
Max/Min	75/18
Income Analysis	
Average	\$26,018
Median	\$20,800
Max/Min	\$364,000 / \$18,720

Objectives & Strategy

EOI was chosen to assist EOI Business Partner with the following:

- Maximize HR staff, allowing greater focus to be placed on the strategic elements required to support a growing employee population.
- Reduce HR administrative time by 25%.
- Redirect Senior HR staff time to more strategic endeavors.
- Increase employee understanding and appreciation of benefits.
- Introduce a new communication and enrollment strategy including an HRIS technology platform and outsourcing of the new hire onboarding process.
- Provide replacement benefits, with the potential to offer new products, that enhance current benefit offerings and contractual provisions.
- Sustain a no-cost or low-cost technology platform with 3-year strategy.

The Challenge

- Identify best-in-class carrier partner to replace existing voluntary offerings
 - Appropriate product set for demographics
 - Reduce administrative burden
 - Select benefits that maximize premium invested
 - Insurability
- Enhance the employee experience in the individual interview by introducing an approach focused on consultation rather than product
- Create a funding vehicle to offset new HRIS platform expenses
- Design a flexible schedule to meet the demands of a call center environment
- Determine appropriate messaging and distribution methods for communication campaign to address employee demographics
- Effective reporting of the eligible class
- Onboard new hires on a monthly basis

The Solution

EOI BUSINESS PARTNER turned to EOI for advisement and evaluation of the voluntary benefit and HRIS platform markets. By taking into consideration EOI BUSINESS PARTNER’s industry segment, business model, and the unique demographics of their employee population, EOI was able to identify a viable solution that would meet EOI BUSINESS PARTNER’s needs:

- replace the current voluntary offerings
- introduce a new permanent life offering
- offset the cost of an HRIS system that would reduce the administrative burden on HR.

This solution was supported by the design and production of a multi-faceted communication campaign tailored to employee age, income, gender, and family status and implemented through the establishment of a fluid scheduling approach. By using a flexible schedule, EOI was able to quickly adjust to accommodate EOI BUSINESS PARTNER’s business needs and support on-site presence for all locations, continuing on a monthly basis. Custom reports were designed to track and confirm employee engagement levels and to aid in the scheduling process.

Through EOI’s commitment to absorb 100% of the cost for onboarding and ongoing funding for the 2012 and 2013 plan years, EOI BUSINESS PARTNER received an HRIS platform valued at

“It was seamless...”

“EOI has been a great part of our strategy because they’re already the experts on benefits and voluntary benefit plans...they’re just an extension of us and they’ve become part of our strategy.”

“They’re very flexible, they’re great to work with, we’ve just really enjoyed our time with them.”

“The great thing about working with EOI is that they really try to get to know your business and they really try to help create solutions for you that work with your business.”

-Christine Kopp,
Employee Health and Well Being Leader

