

Problem

Due to open enrollment, this life insurance client was experiencing **an influx of new insureds** to onboard. Their employee benefits enrollment team was unable to handle the increased workflow without sacrificing quality and customer service standards and needed to **quickly augment their current staff**. Due to the high-volume situation, they required professionals who could excel in their fast-paced environment and manage various tasks associated with enrollment, including application customization, data validation, and generation and distribution of benefits summaries and approval letters.

Response

Within two weeks, Jacobson identified six qualified professionals with the employee benefits experience and strict attention to detail required. Leveraging more than 20 years of proven experience in managing remote projects, we were able to quickly set up and onboard our remote enrollment specialists to ensure they were ready to hit the ground running and make an immediate impact on our client's workload.

Solution

Our team of enrollment specialists was able to navigate the high-volume environment and effectively communicate with clients, underwriters and sales agents to seamlessly complete the enrollment process on time, helping the client **grow 200%** that OEP. Our client was so pleased with the performance of our enrollment analysts that they **converted one consultant to full-time and returned to us the following season** for double the amount of resources.

Operations

Employee Benefits Enrollment Specialist

Client Type: Life and Disability Organization

Project Scope: Group Life Enrollment

Duration: 4 Month

Team Size: 6 Full-Time Employees

