



2026 **CONFERENCE NAME**

TYPE OF EVENT

*Theme goes here*

# Ready, Set, Partner: Building Our Tech Partner Playbook



Navigate With Confidence



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# Agenda

- Opening
- State of the Industry - Where Partnerships succeed & fall short
- Interactive Discussion
- Example Playbook
- Key takeaways
- Closing

# Overheard at the bar

Quotes from the industry:

“We signed the partnership but the value never materialized”

“We built the integration but never saw expected adoption”

“On paper this was a strategic partnership but in reality we were just paying to put our logo on a PowerPoint”

“Would anyone notice if this “partnership” disappeared?”

“The most expensive partnerships are the ones that almost work”

“We keep it alive because we don’t know how to kill it”

# Polling Question 1

On a scale from 1-5 how valuable are your carrier/ben tech partnerships?



# State of the Industry



## **\*Pivot Points: Areas where partnerships are made or broken depending on strategy and execution\***

### Pivot Point 1: Incentive alignment

#### Best Practices:

- Define mutual success metrics like integration build timelines, adoption, growth, & retention
- Incentives tied to outcomes
  - Revisit incentives regularly i.e. build contract language to allow for regular incentive changes/updates
- Ensure key asks are repeatable (not something that will be built for just your partnership)
- Make trade offs explicit in agreement: What gets prioritized when partners/incentives conflict?

#### Bad Practices:

- Assuming things will just work out
- One-sided economics (pay to play)
- Success defined different by sales, product, & operations
- Rigid agreements with no room to grow

## Pivot Point 2: Communication and Ownership Guidelines

### Best Practices:

- Named owners on both sides
- Clear escalation paths that are used
- Standing meetings with agendas tied to decisions not updates
- Internal alignment before external discussions
- Clear documentation & timelines

### Bad Practices:

- Unclear and/or shared ownership
- Status meetings instead of meetings to drive execution and decisions
- No accountability
- Vague requirements

## Pivot Point 3: Integration & Adoption Strategy & Execution

### Best Practices:

- Clear requirements on technology AND business processes
- Iterative development with ops and sales input
- Scaling & adoption strategy defined prior to go-live
- Dedicated contacts for support (tech, ops, & sales)

### Bad Practices:

- Limited of lack of coordination with other business units and sales
  - Not creating enough time for sales to become comfortable with solution and potential limitations
- Not keeping technology resources aligned after go-live for updates or continuous improvements
- Not building in periodic review of integration success

## Pivot Point 4: Iterative review of value and incentives

### Best Practices:

- Regular value calibration touch points
- Willingness to adjust scope, incentives or focus
- Set up feedback loops from clients, sales, & ops at both organizations
- Data driven strategies

### Bad Practices:

- Checking a box with stewardship
- Not having hard conversations
- Feedback not acted on

## Pivot Point 5: Accountability mechanisms

### Best Practices:

- Clear commitments with owners and timelines
- Defined consequences for missed objectives i.e. SLAs
- Contract language that allows for additional action
- Have an exit strategy built
- Building mechanisms for tracking key metrics to hold partners accountable

### Bad Practices:

- Assuming partners will act in your best interest
- Not enforcing SLAs
- Not holding partner accountable for missed deadlines etc.



# Table Discussions

# Polling Question 1

What is the most important feature of your partnerships:

A – Advanced Integrations (API)

B – Service support

C – Favorable Fees

D – Sales enablement & Client Education

E - Other

# Polling Question 2

How many of your formal partnerships would you consider valuable or worth it?

A – 0 – 25%

B – 26% – 50%

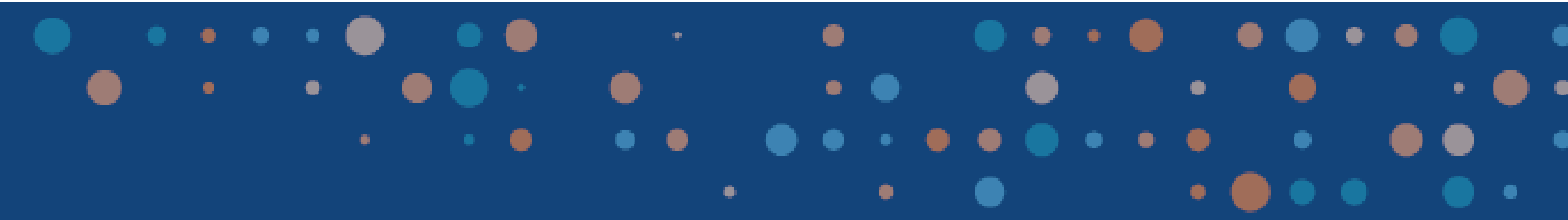
C – 51% - 75%

D – 76% - 100%

# Polling Question 3

In one or two words, name an element of partnerships that is overrated (Word cloud)

# Polling Question 4



What buzzword makes you cringe the most? (Word cloud)

# Table Discussion Question 1

What metrics are you using to track partner success?

# Table Discussion Question 1a

If you could only measure ONE metric to judge partnership health what would it be?

# Table Discussion Question 2

When there are roadmap conflicts how do you decide priority?

# Table Discussion Question 3

What are some examples of good accountability mechanisms? How do you hold partners accountable without destroying the relationship?

# Table Discussion Question 4

What should be contractually guaranteed if a platform is charging partnership fees?

# Table Discussion Question 5

What are some warning signs that you're in a zombie partnership? And what can you do (if anything) to improve it or get out of it?

# Table Discussion Question 6

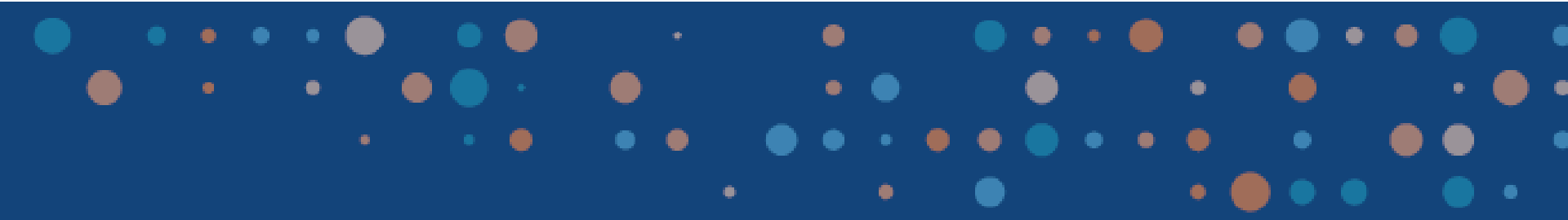
Outside some of the more well-known features of partnerships today like fees, service support, and integrations. What are some other tangible or intangible features of a thriving partnership? What is the exit strategy (have you read contracts and know your options)



# Example Playbook Review

# Playbook QR Code

# Polling Question 5



Who is your favorite partner? (anonymous Word cloud)

# We Value Your Feedback - Share It in the Conference App.

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2026 Enrollment Technology Strategy Seminar

- Event Feed
- Agenda
- Community Engagement
- Conference Resources
- Speakers
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**Agenda Option**

Detail

Date and Time

★ ★ ★ ★ ★ (no ratings yet)

Location

Session Chat

Add To Calendar

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# Wrap Up

# Thank You



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