

Summary



Cards

Rose: What are the best things about carrier and tech partnerships?

Having a playbook of EDI, compliance, marketing, implementation timelines that are agreeable

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True partnership. Carriers collaborate and deliver on outcomes

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Having a dedicated person to talk with to solve issues, servicing, new opportunities, renewals and cross sales

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Dedicated resources for questions and escalations for quick resolution. Sharing Collective experiences and consultation to adapt to the ever changing world of Ben admin.

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Contact discussion. Instead of paying for a logo there is value of SLA for discussions. Supporting each other in the relationship.

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Tangible results for ROI and drive down costs

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Experienced professionals in the space

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Collaboration is key. Shared investments go a long way

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Partnership, knowing the business, not starting from zero

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Desire for standards like LDEX



Relationship— the people! Creating meaningful alignment on roadmaps and strategies.

Aligned growth metrics— so you feel like you aren't in it alone with sales goals and industry gaps/ opportunities.

Relationships build industry cohesiveness and breaks down silos.

There is a layer of education around the ecosystem which strengthens the message we take to customers and how we relate to the customer experience. Jointly focused on the employee experience create better and more aligned outcomes. Keeping the employee at the center of all we do.

Taking the friction out of the client enrollment experience— if things go wrong we have an escalation point of contact.



Pipeline discussions



Bud: Where do carriers and tech platforms have mutual opportunity?

Compliance/ AI state regulations



Creating a scorecard to standardize expectations from platforms.



Optimizing enrollment and decision support tools



Meet employee in the moment without wasting their time



Opportunity to remove friction and barriers between carriers and employees



File standardization, file layout



Making sales and ops more aligned on timelines, better than it was but still need to improve



Enhanced communication approaches to provide the best service and support to employees



AI - great start but how will we incorporate into every day.



More usable playbooks



AI making the enrollment experience better. How do certain platforms fill in the blanks (ie- decisions support products)



Benefit Assistants are good but not detailed 100% towards carrier products. Need to be tailored toward carrier-specific products.



Configuration that drives the template vs one off builds



Collaborative go to market strategy



Data adaptability and conversion



Privacy concerns around data and getting more data – how do we gather more data without invading the employee privacy/



Collaboration between sales and ops



Standards to be aligned between carriers and Ben Admin partners



Technology credits– should we take a stand on them? How can we avoid?



API



How do we better market the value of our integrations and partnerships to the market



Carriers are investing in relationships hit hard to differentiate



Thorn: Where do carriers and tech partnerships struggle?

Small market standardization— how do we move forward?



Tech credits— when is too much too much?



What's the value of the partnership?



Case build continues to be a hassle



Keeping up with demand



Get more users into the ben admin and decision support tools



Differentiation between carriers when all are partners



Conflicting capabilities. Carrier needs x, but admin can only provide y.



Carriers pocketbooks are getting smaller— these partnerships are costly— can we standardize the value? (\$)



Technology roadmaps, prioritization



Product and implementation gaps with api development



Legal doesn't understand AI, can't get over the hump



Market needs change before we can catch up with the last change.



Lack of execution on implementation even when you have a strategic partnership with a Ben admin



PFML and other product customization needs



Focus on impact to client on implementation time. Why done we have timing across platforms and carrier standardization?



Partnerships aren't as unique. How do we make them more valuable



Getting quality data!!!!

