

Meeting *Planner*



Power Your People with OneDigital capabilities



Account Management A veteran team consisting of a benefits consultant, account manager, implementation manager and various support roles in technology, analytics, compliance and communication actively partners with you to ensure timely and comprehensive marketing planning occurs to meet your goals and objectives.



Alternative Funding Your plan is about your business, so taking a truly objective approach to financing your benefit investment is important in determining what works best for you. Analytic tools allow us to illustrate the value of considering alternative funding arrangements and any possibility of risk unique to you.



Carrier Relationships Great relationships with numerous carriers equate to the best benefits choices and price points for our clients. Our representation of hundreds of thousands of insured members across the country holds the attention of vendors, meaning preferred pricing, underwriting flexibility, innovative solutions and enhanced benefit levels.



Communication Services Through research conducted on hundreds of clients, a layered approach using messaging, technology solutions, employee videos and content produces the best results. When employees become educated consumers, their satisfaction rate with their benefits package increases exponentially.



Compliance Navigating the complex web of ACA and related compliance requirements can be a frustrating, time-consuming process. With our team of dedicated attorneys and compliance experts by your side, you can rest easy with the technical advice and practical support you need to protect your organization and your employees.



Data Analytics A high level of strategic support and advanced plan analytics results in better information, improved decision making, less internal analysis and optimal plan to manage benefits costs and maximize value to you and your employees. We're unbiased and committed to finding the best value and solution for your organization.



Voluntary Products OneDigital helps employers expand their product offerings—while not increasing employer costs—by offering an array of discounted voluntary plans. These plans help employees customize their benefits to fill in financial gaps in the event of unexpected health care costs like accidents, serious illnesses or hospital stays and help provide financial piece of mind.



Global Benefits Today's globally mobile workforce requires the promise of world-class benefits and a white glove customer service experience, and our team of global benefit experts helps you deliver both while also streamlining administration, reducing risk and staying compliant wherever your employees are around the world.



Human Resources We take an active role in your program, driving education, employee communications and keeping you informed of timely industry trends and regulatory updates. And, our HR Consulting partners can take it a step further to provide practical and sustainable solutions to a full range of HR and organizational challenges.



M&A Our experience in merger and acquisitions is extensive. We are active participants of company purchase and sale from the initial due diligence process, actual acquisition and then taking over as the broker/consultant of the acquired company.



Member Support Real, live people are available by phone to make your health and benefits plan work better by answering questions, researching problems, eliminating administrative headaches and handling escalated issues.



Pharmacy Analysis Led by an actuary specializing in pharmacy contracts, our Pharmacy Analytics Team will support a deep dive into pharmacy (PBM) claims and management in an effort to reduce your overall pharmacy costs.



Retirement Planning Comprehensive education and communication strategies help employees better understand the value of our clients' qualified retirement plan benefits and how it reinforces their family's financial planning. Specific communications for target employee groups such as retirement readiness, Medicare, young families, and education planning among others are also available.



Technology Platforms Tools and a support team will streamline your HR and benefits technology needs, including an all-in-one platform to empower employees with online enrollment and simplify your HR administration.



Thought Leadership With various seats on legislative committees and national associations, we are participating in discussions driving employee benefits at the highest level to maintain and improve employer-based health insurance.



Wellbeing By fostering organizational change to empower employee health and wellbeing, you can maximize your workforce and reduce costs. Identifying your cost drivers and health risks, inventorying current offerings, and determining organizational factors most impactful to program success crafts short- and long-term plans to help solve key business challenges.

PROJECT

Date

Attendees

Phase

R1

R2

Finalist

Follow Up

Demo

Agenda

Previous meeting follow up

Goals

Notes

CLIENT NOTES

Pain Points

Industry Insights

What's going to do it?

Notes

NEXT STEPS

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- 1
 - 2
 - 3
 - 4
 - 5

Wellbeing 60% of adults have a chronic disease. For employers, health spending on an individual with a chronic illness is eight times that of a healthy individual.

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Communication

Only **4 in 10** employees believe their employers' benefits communication is simple to understand. When employees understand the relevance of their benefit offerings to their lives, employers get a more engaged, loyal, and productive workforce.

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A vertical timeline with five numbered circles (1-5) on the left and horizontal lines extending to the right for notes. The circles are blue with white numbers. The lines are light blue.

Voluntary

The ability to choose offerings and customize a holistic benefits package is increasingly important—in fact, **93%** of employees say that the ability to customize their benefits is a must-have or nice-to-have option.

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R1

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2020

JANUARY

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