



# Your automated solution for targeted communication

## Action Manager<sup>SM</sup> by businessolver

Annual Enrollment is a stressful time. Employees are doing their once a year review of benefits that will affect them for the next 365 days. During this time, it's essential that your employees are not only enrolling in the benefits they need, but also providing the documentation that is required for those coverages to activate.

Action Manager delivers automated, targeted communications based on specific events in Benefitsolver. It automatically pushes emails, messages, printed documents or texts to your employees based on customizable timetables. All to ensure your employees have the coverage they need, when they need it most, at no additional cost to you.

### How does Action Manager work?

It's simple really. You choose the action based on the list below and then customize how you want the communication to be carried out.

#### 1. Choose an Action:

- An eligibility window (Open Enrollment, New Hire or Newly Eligible) is closing
- In-progress transaction was not completed
- Dependent verification documentation is due
- Evidence of Insurability is required
- A dependent has reached max age

#### 2. Customize Your Communications:

- Strategize your timing – Customize when communication will be sent based on the number of days before or after the action occurred.
- Choose your template – Pick from a number of templates pre-loaded into Benefitsolver, knowing that each have been reviewed and approved by our compliance experts.
- Select your delivery options – Choose from a variety of delivery options including Work Email, Personal Email, Message, Text or a printed document.

#### 3. Sit Back and Relax: Benefitsolver will take it from here

# Customized communications any time, any place

## Action Manager<sup>SM</sup> OnDemand by businessolver

Effective communication to your employees is critical to a successful benefits strategy. Making sure your employees are selecting the best plans to meet their needs, will save you time and money. We designed Action Manager to ensure your employees meet the requirements needed to activate their coverages; we designed Action Manager OnDemand to make certain your employees truly understand the benefits you have hand-picked for them.

Action Manager OnDemand goes beyond our base model by allowing you to send targeted communications outside of a specific event. This means you can send communications, tailored to a specific group, on demand using real-time Benefitsolver data.

### How does Action Manager On Demand work?

We leveraged our robust Build a Report tool, inside Action Manager, to make it easier than ever to drill down to a specific group of people. Using this tool, Action Manager OnDemand can be set up to deliver customized communication to a chosen population when the time is right. No trigger needed.

#### 1. Select Your Conditions:

Leverage our Build a Report tool – Select the conditions to meet your need. You can drill down by location, age, plans, eligibility, and so much more. Using this tool, you can create a made-to-order list to ensure that the employees receiving your communications will benefit most.

#### 2. Choose A Template:

Pick the template that delivers the message you need.

#### 3. Select The Time And Place:

You get to decide the date and time this message hits your employees inbox... or mailbox... or phone. Delivery options include text, email, message or a printed document.

#### 4. Deploy:

Schedule communications in advance or send them immediately, choose to send once or set up a recurring event. Once you hit save, Benefitsolver takes the wheel.