



**Benefitfocus<sup>®</sup>**

# Expecting Service Excellence from Your Benefits Administration Partner

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Your guide to assessing the  
right service and support  
model for your organization





## In the employee benefits ecosystem, service excellence always matters.

Selecting the right benefits administration solution is about much more than finding a way to collect employee data and manage enrollment. It's also about convenience, the user experience, ease of use, data security, strategic guidance and so much more. And when it comes to the vendor-client relationship, good customer service is table stakes, while exceptional customer service is a brand differentiator.

Service and care that exceeds expectations is the mark of a modern, forward-thinking benefits administration partner. The right vendor can understand, anticipate and manage the complexities of your organization's benefits needs, from varying eligibility requirements to robust benefit offerings. In fact, this shift marks **the next era in customer care**, where hospitality drives client-vendor relationships, rather than a transaction-based customer service model.

At a time when **more than half of customer care leaders** predict call volumes to increase as much as 20% over the next two years, benefits leaders should prioritize strategies and partnerships that simplify and streamline benefits communication and support as much as possible, not only to avoid overextending their internal teams, but to ensure engaging and satisfying employee benefits experiences.



**More than half** of customer care leaders predict call volumes to increase as much as **20%** over the next one or two years.

In this guide, we'll explore what service excellence means today in the world of benefits administration and engagement. We'll also walk you through the features and services you should expect from a benefits administration partner, what the current market landscape looks like and how to select the right partner for your company's — and your employees' — needs.

## Exceptional Service for Everyone

In the partnership between an employer and a benefits administration provider, there are two main categories of “customers” receiving service and support:



**Your in-house  
benefits team**



**Your broader  
employee population**

Being able to provide an exceptional experience to customers in both categories at the same time is a defining feature of top benefits administration vendors.

### Pillars of Benefits Administration Service Excellence

Every benefits administration partner should have its own definition of service excellence and what it means to demonstrate hospitality in customer care. At Benefitfocus, we strive to uphold the following pillars of service excellence:

- ✓ **Expansive Scope:** We are committed to serving both your HR team and employees for year-round engagement across the client lifecycle, from pre-sale through advocacy.
- ✓ **Strategic Vision:** We seek to understand our customers’ goals, values and priorities to provide expert guidance and support.
- ✓ **Tactical Expertise:** We draw on industry best practices, including the successes of other customers, to help all our clients maximize the ROI of our partnership and solutions.

Because of the sensitive nature of employee benefits, personal service is key. Ideal benefits administration partners prioritize one-on-one service through a live contact center where employees can get expert answers, while keeping your in-house benefits team free for other responsibilities. At the same time, it’s crucial to provide digital tools that are personalized and self-guided, so employees can easily access information about their available benefits, enrollment details and other important information. If you’re entertaining potential partners that don’t offer a highly rated mobile app, you just might want to keep looking.


## Relationships Are the Heart of Effective Partnerships

One key benefit of working with the right benefits administration partner is difficult to quantify: trust. The most successful partnerships are based on trust and collaboration. Before you engage a benefits administration provider, examine their history, customer reviews, ratings and reputation. And, throughout your interactions with potential vendors, pay close attention to the level and quality of service you receive from the pre-sales and sales teams – and beyond.

## Where to Expect Service Excellence

Customer service touchpoints are everywhere, so you should expect a customer-first experience throughout every stage of your benefits administration partner journey, year-round.





The service you and your employees experience should be characterized by the quality and outcomes of every interaction. You should expect your benefits administration partner to make relationships a top priority and continually plant seeds of confidence. While their underlying technology is essential, as there would be no service to offer without it, benefits administration partners should understand that success begins with **building foundational relationships** with clients. This starts with taking time to understand your organization and benefits team's specific challenges and goals, moving forward to match your account with a right-fit internal team that's positioned to see you through to success.

In addition to cultivating trust and mutual respect, a "right fit" partner should demonstrate alignment with your company values and culture, provide customized guidance and strategic planning based on your unique needs and goals, and communicate with transparency and responsiveness.

“ We do urge all companies using any kind of outsourcing service to be involved rather than hands-off partners. It's critically important to manage outsourcing providers to ensure that work is being performed as promised, to review services on an ongoing basis and to make sure you're getting the kind of reports and data needed to make positive changes for your employees and organization.

– Stacey Harris, Chief Research Officer and Managing Partner of Sapient Insights Group, [HR Executive](#), April 15, 2024



## Features and Services of Ideal Benefits Administration Partners

Most likely, you're exploring options for outsourcing benefits administration in order to maximize the impact and ROI of your benefits programs, reduce the burden on your in-house team and empower employees with the information and tools they need to make the most of their benefits. Looking at the broad landscape of benefits administration vendors, it's clear that not every provider offers the same solutions. So, you're left with the challenge of comparing apples to oranges, and if you've never worked with a benefit administration partner before, you may not even be sure of everything you need your next partner to provide.

To this point, evaluating potential partners is, of course, about more than checking off a list of functional requirements. To select the best solution for your company's specific needs, we suggest assessing each prospective vendor across these four dimensions:



### **Core Administration**

The outsourced functionality and end-to-end platform features that help ensure your HR team has the tools, data and insights needed to operate efficiently, optimize resources and remain innovation-ready for ongoing program success.



### **Service and Support**

The level of service and support provided to your HR team and employees that helps drive quality and consistency, protect and extend your technology investment and increase your capacity to impact business results.



### **Employee Benefits Experience**

The experience-shaping interface that guides employees to their next best action, streamlining and simplifying each step to help them achieve maximum value across health and financial benefits and engage year-round.



### **Partner Fit**

The vendor health and cultural elements that constitute a successful strategic partnership including complementary industry experience and functional expertise; alignment on vision and values; and a shared approach to defining and achieving goals, communicating effectively and resolving issues.

Of course, you'll want to determine how your prospective partners deploy HR and employee support within each function's service model. This has the potential to reveal critical differentiators between vendors and help you find the right "fit" for your organization.



To learn more, explore our [2024-2025 Benefits Administration Buyers Guide](#).

**In the pages that follow, we'll take a closer look at assessing a potential benefits administration partner based on their approach to service and support.**



# Evaluating the Service and Support Model of a Potential Benefits Administration Partner

Use this checklist to assess potential vendors and compare them against one another.

## Client support

- Smooth Implementation – Do they have a clear implementation process with timelines and involve the client manager from day one?
- Industry expertise – Do their service and support team members have deep benefits administration experience?
- Service philosophy – Is their service grounded in the principles of predictability, proactivity and partnership – do they take feedback well?
- Single point of contact – Do they offer an experienced single point of contact, backed by a team of subject matter experts?
- Comprehensive metrics – Are performance metrics and scorecards shared regularly? Poor customer service – the vendor support you receive fails to drive strategy and innovation.

## Employee Support

- Multichannel support – Do they offer support via phone, email and chat and have high resolution rates?
- Sophisticated chatbot – Do they offer an AI virtual assistant that continually improves?
- Clear approach to workforce management – Do they use a thoughtful, clearly articulated approach to workforce management (e.g., customer service representative training, capacity planning, etc.)?
- Proven success – Can they demonstrate their success with metrics such as first-call resolution, average speed to answer and customer satisfaction score?
- Telephonic enrollment – Can customer service representatives help employees enroll over the phone?
- Availability – What hours is employee support available and are they extended during open enrollment?
- Multi-language support – Can employees chat with an agent in 20+ languages?

## Enhancements & Training

- Product releases – What is the frequency of product releases, how are they communicated, and is there flexibility in adopting new features?
- Enhancement feedback – How can you share thoughts on current and suggestions on future functionality?
- Multi-channel training – Do they offer a variety of customer training options?
- Professional development – Do they offer educational content and training that provides the latest on industry updates? What about opportunities for professional development?





## Final Thoughts on Outsourcing Benefits Administration

Since our founding in 2000, Benefitfocus has been helping organizations deliver better employee benefits — and a better benefits experience. Many companies outsource bits and pieces of the benefits administration function. According to research by Sapient Insights Group, as reported in [Human Resource Executive](#), 55 percent of all companies either partially or fully outsource the administration of some benefit offerings. Services most frequently outsourced include retirement planning (70 percent), COBRA administration (69 percent), employee assistance programs (64 percent), voluntary benefits administration (57 percent) and spending account administration (47 percent).

Selecting a benefits administration partner that can offer end-to-end solutions, expert strategic guidance and an unmatched employee benefits experience can help your company provide benefits that align with your employees' needs and priorities, expand your benefit offerings and enhance utilization — all key components of supporting overall employee satisfaction, retention and talent attraction.

## Benefitfocus Can Help

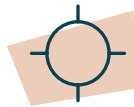
Benefitfocus is committed to helping organizations and the individuals they serve get the most value out of their health care and benefit programs.

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### We are helping to clear the path to



Easier  
administration



Higher benefits  
engagement



Optimized benefits  
decisions

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