

# SELERIX ENGAGE

## RESELLER CASE STUDY:

### Adapting to Modernized Engagement Demands



### Company Overview

Prepare Benefits is a national enrollment company specializing in group benefits education adding value to the enrollment process through web-based technology and professional consultation.

Their communication strategy offers a unique approach combining visual learning with interactive engagement to create a personalized, non-intrusive educational experience.

### THE CHALLENGE

As a trusted advisor of benefits education and enrollment services, the team at Prepare Benefits faced the unique challenge of engaging a pandemic-shifted, virtual workforce. Their existing communication tools lacked the native functionality to deliver communication to targeted audience segments, resulting in a time-consuming process to personalize benefit communications. Prepare Benefits needed to transition away from manually developing, scheduling and deploying employee communications to proactively meet the needs of their clients and address the growing demand for personalized digital communications. Additionally, the team at Prepare Benefits needed consolidated insights and metrics to measure the effectiveness of each communication effort – something their existing toolset failed to provide.



# THE SOLUTION



Prepare Benefits adopted Selerix Engage as the organization's integrated communication solution. The Prepare Benefits team was able to expand their arsenal of value-added services to meet their clients' evolving communication needs and realized the expanded functionality and resource-saving features of Selerix Engage.

## The Solution Included:

- ▶ The ability to **send and schedule multiple communications in advance** with intuitive campaign tools and automated reminders for recipients
- ▶ The ability to **leverage datapoints in BenSelect to deliver personalized employee communications** – no spreadsheets, one platform
- ▶ Tools to **customize and build branded content, including a library of pre-built templates** to deliver campaigns, messages, surveys and quizzes
- ▶ Real-time metrics that provided Prepare Benefits and their clients **key insights on the effectiveness of their communication efforts.**

# THE RESULTS



An immediate and substantial **reduction in the time required to plan, schedule and deploy communications** to their diverse book of clients.



**Increased levels of personalization** by leveraging existing data points in BenSelect that included demographics, job class, location, enrollment status and more.



Consolidated outreach process that **eliminated third-party data exchanges and subscriptions** by combining the ability to deliver texts and emails from a single platform.



**Significant reduction in setup time required for each branded campaign** by leveraging Engage's template import functionality.

*"Our goal at Prepare Benefits has always been to create impactful employee experiences that exceed the expectations of our employer clients. Selerix Engage is a strategic tool that furthers our ability to deliver tremendous value to our clients while saving significant time and resources as an organization."*

**Andrew Jennings**  
**President, Prepare Benefits**

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