

Fortune 500 Insurer Streamlines Employee Enrollment for Largest Corporate Client



Disrupting the Enrollment Process

The worksite insurance provider needed to prepare for an annual open enrollment event with one of their largest customers, an enterprise premier care provider with over 13,000 employees in locations across 29 states.

The provider's existing scheduling technologies were not making the event very effective for either the provider's staff or the customer's employees.

Staff on-site for the event had been idle for long periods; staff calendars had few appointments no-shows were common. Employees who tried to schedule appointments found available times inconvenient.

The Search for a Solution

The provider decided to focus on improving the appointment process. The chosen application needed to meet a few minimum requirements.

The requirements included the ability to assign specific enrollers across multiple locations, personal data protection and integration with their CRM platform, Salesforce. This criteria pushed SUMO Scheduler to the forefront of scheduling options.

Being a Salesforce native application, SUMO assured bank-grade data security, Hipaa compliance and seamless integration with their Salesforce platform.

A Better Customer Experience

SUMO turned the manual and unreliable process of booking appointments into a seamless and secure connection between insurance experts and the employees.

Staff can now be matched with employees based on their insurance needs and the enroller's areas of expertise, delivering them the expert assistance they require.



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A self-scheduling link filled staff calendars by allowing employees to book appointments when it was convenient for them. And automated text and email reminders sent directly to the employee helped to curb no-shows.

The addition of SUMO Scheduler to the provider's open enrollment process improved both the productivity of their enrollment representatives and the overall experience for the customer.

"Our insurance clients are reporting that SUMO Scheduler is adding up to 50 percent more appointments to their insurance agents' calendars."

*Jason North
CEO and founder of SUMO Scheduler.*

The Numbers

13,000+

employees are able to self-schedule with a rep based on their product interests and needs.

8,000

independent agents matched by product certifications, tenure and geography.

400

locations staffed by skill-matched reps with a schedule of pre-set appointments.

