



# Selecting an Employee Benefits Partner for Your Technology Staffing Firm

# Presenters



**Michele Clarke**

**CFO & COO**  
**TechServe Alliance**



**Tommy Poulin**

**Health & Benefits Advisor**  
**TechServe Alliance**



**Brian Drummond**

**CEO**  
**Kasa**

# Agenda

- Why Selecting the Right Benefits Partner Matters
- Best Time to Interview New Benefits Partners
- What to Expect from Your Benefits Partner
- Important Questions to Ask During Selection



# Why It Matters

# Employee Satisfaction/Retention



89 percent of employees expect decision-making tools during open enrollment.



54 percent of employees say selecting a health plan is more complicated than solving a Rubik's Cube.



More than 1 in 5 employers say that helping employees choose the right health plan is a top challenge



Effective communication is key to having a successful open enrollment season; especially for virtual enrollments.

# Make the Most of Your Benefits Investment



- Typical Technology Staffing Firm Spends \$218K on Benefits (\$84K on medical/dental/life/disability)
- Broker Compensated by Carrier and/or Other Sources



# Best Time to Make a Change

HINT: Not Right Before Renewal





90-364 Days  
Before Next  
Renewal





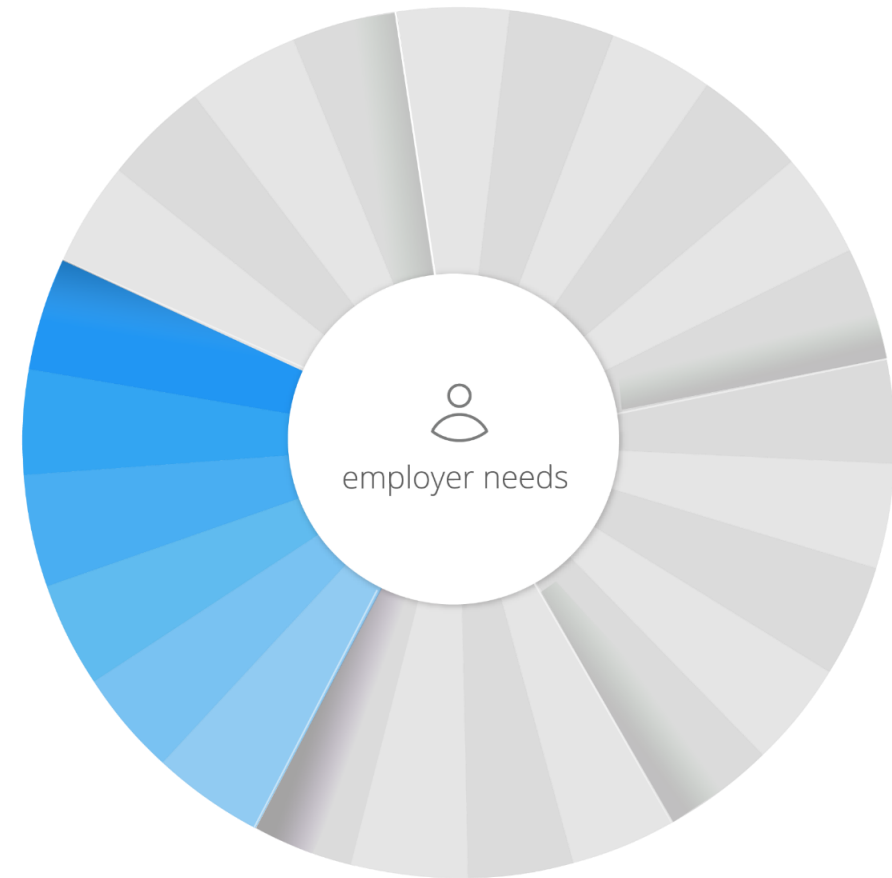
# What to Expect from Your Benefits Partner

Do You Hear from Your  
Broker Only Once a Year?



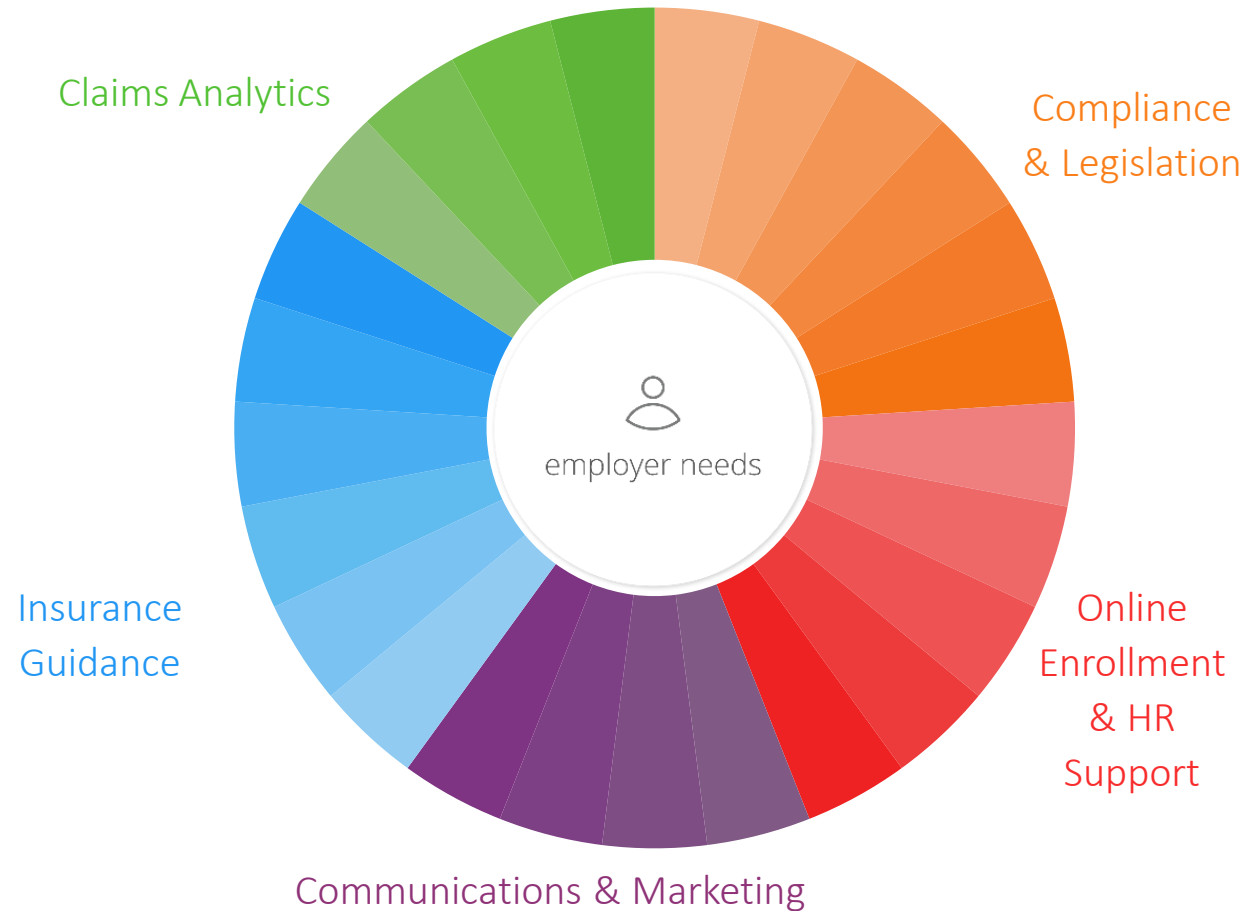
# Typical Services Every Agent Should Offer

- Quote Plans
- Claims & Billing Assistance
- Negotiate Renewal
- Plan Comparison
- Coverage & Policy Expertise
- Application Submission



# Technology-Backed/Full-Service Benefits Partner

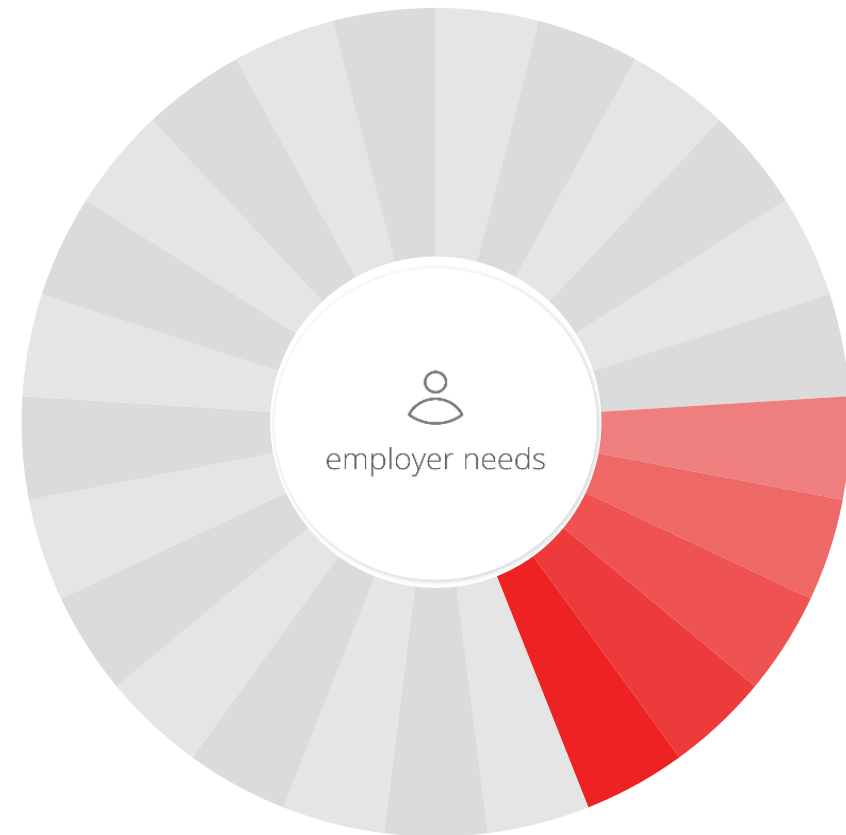
- ACA & DOL Compliance\*
- 6055/6056 Reporting\*
- 1094/1095 Filing\*
- HR Assistance
- Employee Benefits Statements
- Employee Handbook\*
- Vacation Tracking
- Online Enrollment
- Onboarding/Offboarding Assistance Plan
- Design Decision Support
- Employee Portal/HR Intranet
- Health & Wellness Information
- Healthy Lifestyles/Fitness Programs
- Employee Newsletters & Videos
- Employee Communications
- Quote Plans
- Claims & Billing Assistance
- Negotiate Renewal
- Plan Comparison
- Coverage & Policy Expertise
- Application Submission
- Plan Design & Selection Support
- Medical & Prescription Analytics
- Plan Disruption Analysis
- Employee Retention Strategies



\* Additional Fees May Apply

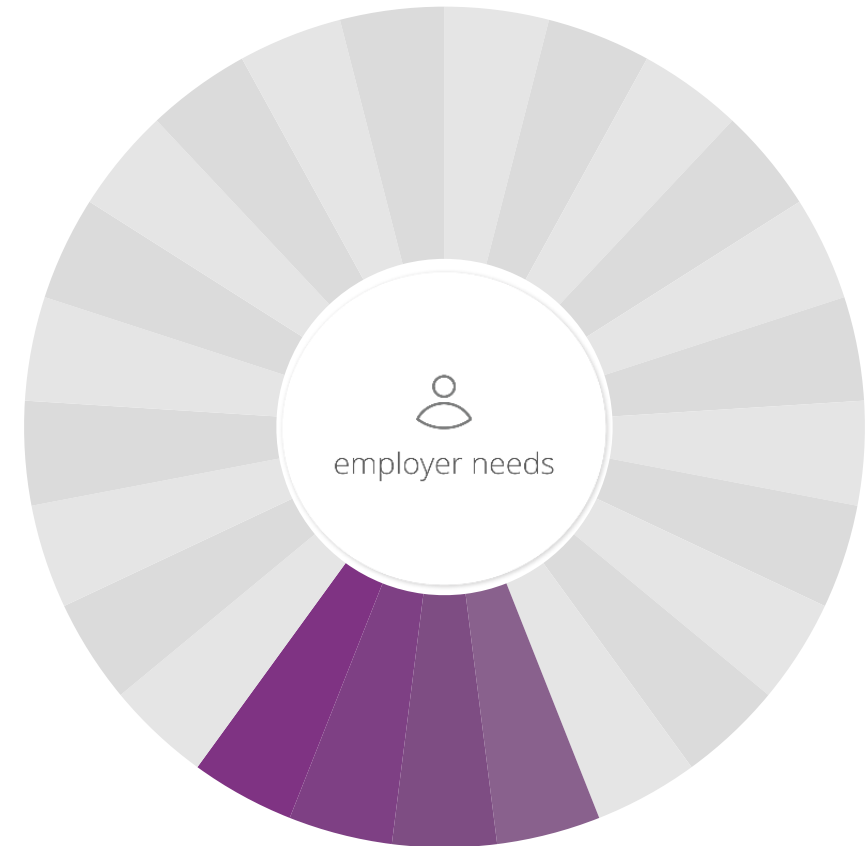
# HR Support

- Vacation Tracking
- Online Enrollment
- Onboarding/Offboarding Assistance Plan
- Design Decision Support
- Employee Portal/HR Intranet



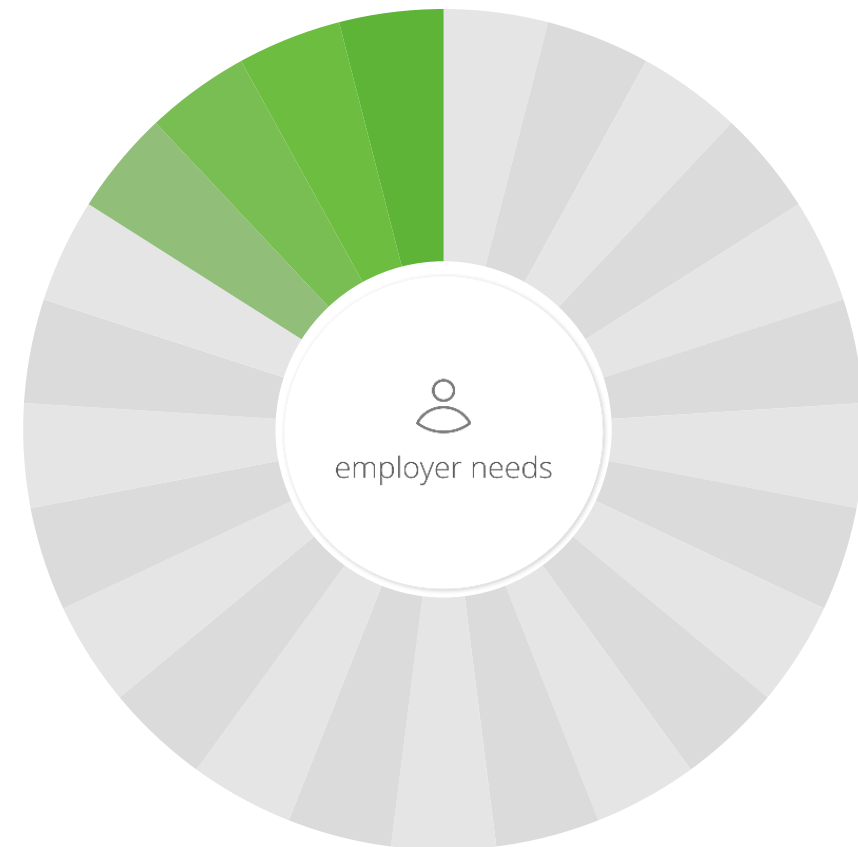
# Employee Engagement

- Health & Wellness Information
- Healthy Lifestyles/Fitness Programs
- Employee Newsletters & Videos
- Employee Communications



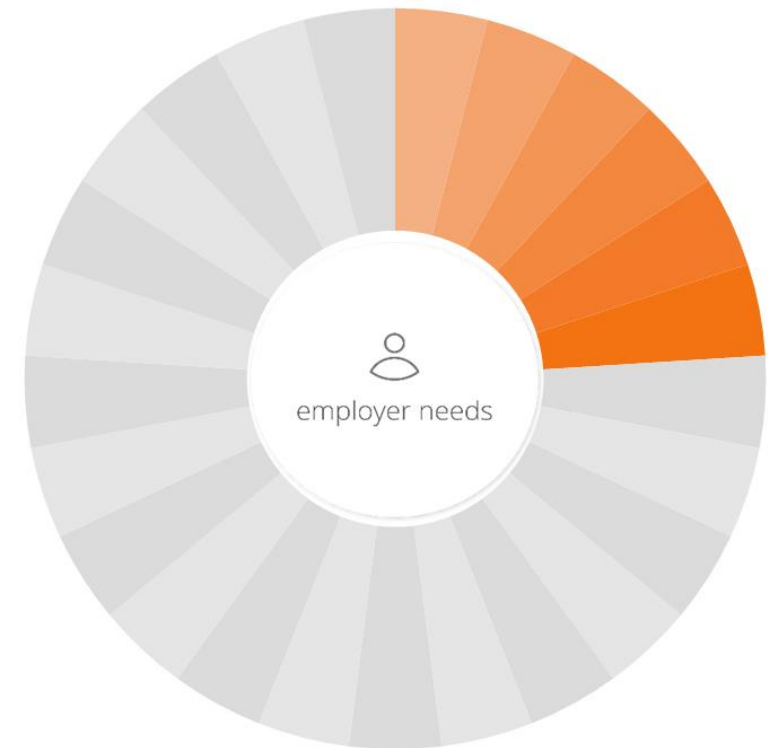
# Plan & Claims Analysis

- Plan Design & Selection Support
- Medical & Prescription Analytics
- Plan Disruption Analysis
- Employee Retention Strategies



# Compliance & Legislation

- ACA & DOL Compliance\*
- 6055/6056 Reporting\*
- 1094/1095 Filing\*
- HR Assistance
- Employee Benefits Statements
- Employee Handbook\*

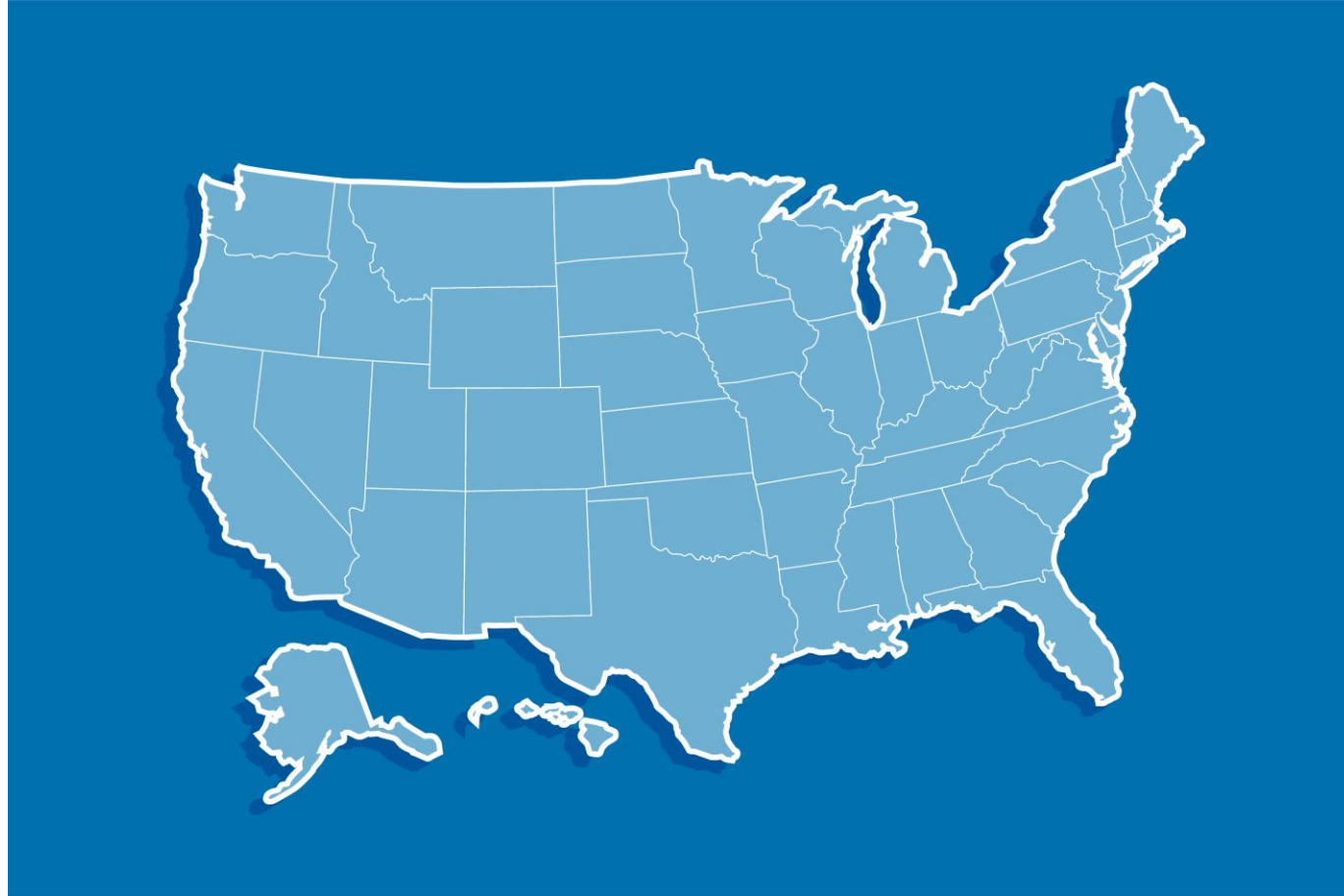




# **Important Questions to Ask a Prospective Benefits Partner**



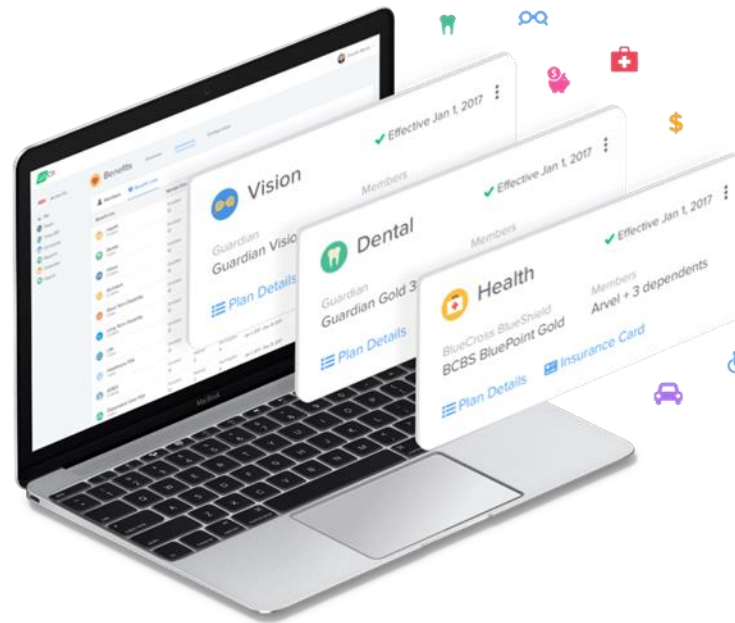
# How Many Multi-State Clients?



# How Many Staffing Firm Clients?



# What Technology Is Included?





**Questions?**



[poulin@techservealliance.org](mailto:poulin@techservealliance.org)  
239-560-8060



# Coming Soon!

## Executive Summit 2022

In partnership with the

**Society for Information Management (SIM)**

Join us for a gathering of technology staffing firm owners, executives and managers, plus – CIOs, CTOs and other senior IT leaders to discuss topics such as:

- Succeeding in a Work-from-Anywhere-Sell-to-Anywhere-World
- Leadership and Culture
- Building and Retaining a High Performing Staffing Team
- The Staffing Firm Tech Stack



**Nov. 7–9**

**2022, La Quinta Resort & Club**

**Palm Springs, CA**

**<https://events.techservealliance.org/2022>**