



BRI Insights

LEADING EMPLOYEES TO THE BEST DECISIONS

Benefits decisions are complicated and often require a personalized touch to understand the nuances and advantages of each. Through the **BRI Insights** decision support tool, employees are not only able to gain a better understanding of their benefit choices, but also get a personalized assessment and recommendations for health plans, contribution strategies and other benefit programs.

HOW IT WORKS

STEP 1. EMPLOYER SET-UP

Upon agreement for services, employers provide benefits information and an employee eligibility file, including email addresses, which are used to configure the decision support tool.

STEP 2. EMPLOYEE EMAIL CAMPAIGN

Employees will receive a series of communications inviting them to complete their personalized benefits assessment.

STEP 3. BENEFITS ACTION PLAN

Employees answer simple questions about their household, expenses, and benefits goals. The tool educates the employee about their choices and makes personalized recommendations based on the information they entered. These recommendations can then be used to help them enroll in the benefits that best suit their needs.

STEP 4. POST-ENROLLMENT REVIEW

Employers are invited to meet with their assigned Account Executive to discuss the results and impact on enrollments.

BRI INSIGHTS

Personal Information

Welcome to the Benefits Guide!
Let's take a few minutes to look at your options and see how we can spend your dollars efficiently.
First, please tell me a little about yourself...

My name is Margie and I will be turning 37 next year.
My local zip code is 14450 (near Fairport, NY)

My household income is \$86,000 with \$50,000 coming from this employer.

CONTINUE

THE BENEFITS OF USING A DECISION SUPPORT TOOL

PROMOTE CHOICE

Benefits are not a one-size-fits-all approach and employees want choice. But, with choice comes decisions and complexity. BRI Insights helps employees effectively navigate their benefits decisions.

OPTIMIZE CONTRIBUTIONS

This tool not only present employees with their benefits options, but educates them on **why** they should consider that option based on their household needs..

LOCALIZED RECOMMENDATIONS

BRI Insights uses an employee's home zip code to provide average costs for expenses in that area. These costs can be adjusted manually by the person using the tool.

SMART SAVINGS

BRI Insights provides employers and employees with information and resources they need to make not just good decisions, but the best decisions. This translates to savings and peace-of-mind for all.

BRI PRO TIP

Focus on reminding employees to complete the personalized assessment and BRI Insights helps take care of the rest.



| FEATURE | BRI INSIGHTS | BRI INSIGHTS ⁺ |
|---|--|---|
| Health plan benefits comparison | ✓ | ✓ |
| Pre-tax contribution recommendations | ✓ | ✓ |
| Employee communication program | ✓ | ✓ |
| Integrated with BRIWeb access | ✓ | Stand-alone |
| Integration of dental, vision and other ancillary benefits | Optional | ✓ |
| Integration of 401k contributions | Optional | ✓ |
| Ability to link consumerism tools and resources | - | ✓ |
| Access to plan design modeling | - | ✓ |
| Employer reporting and insights regarding usage, savings and migration analysis | - | ✓ |
| COST | | |
| New health account clients with 250+ eligible employees | Waived | Set-up waived. \$2.00 per eligible employee per month, 12-month minimum |
| Health account clients | \$250 set-up, \$1.00 per eligible employee per month, 12-month minimum | \$250 set-up, \$3.00 per eligible employee per month, 12-month minimum |

WHERE BENEFITS STRATEGY MEETS ACTION

As health care expenses and premiums continue to rise, employers are often forced to pass some of these costs along to employees. But, in order to realize savings, employers and employees need to see the connection between plan selection and plan savings.

GET STARTED

Contact your Regional Manager to request a Service Consultation Meeting or demo and quote for services.

This is where BRI Insights comes in.

- Creates a bridge between benefits plan design and employee savings
- Aids in education and support for remote workers
- Ensures that every plan participant understands their choices and selects the right plan for their needs.
- Reduces need for large, printed benefits booklets and in-person benefits fairs.

See a preview: vimeo.com/454748759.



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