



# Tailored Worksite Services Success Story



Tailored Worksite Services



Staff: 2



Katy, Texas



Groups on EaseConnect+: 26

## EaseConnect+ Connection: Guardian

### According to Jeff Finn, President, Tailored Worksite Services

Before EaseConnect+, Jeff and his team were looking for a way to simplify administration and cut down on time when managing eligibility for groups with Guardian. But as cases grew, the process became more and more time-consuming.

That's when Jeff and his team found the EaseConnect+ Guardian connection. Through the direct connection with Guardian, group change data is automatically sent over to the carrier. What used to take two hours each day,

has now been reduced to only a few hours per week. With the time Jeff and his team are saving, their biggest focus is now sales—not only spending with their current clients but also interacting with prospective clients.

### How EaseConnect+ Works for Tailored Worksite Services

- Saving 20 hours per week on enrollments.
- Agency employees are getting back two-thirds of their workweek to focus on other projects.
- Knowledgeable training from the Ease team.



With the time I'm saving with the Guardian connection, it frees me up as the owner to think of ways we can better service our clients. I would not have had time last year to help my team think through something like setting up virtual enrollments during a pandemic.

Jeff Finn



## The Success

Not only has having the direct connection to Guardian been a time-saver, but it has also helped Jeff and his team easily transition the user experience as the workforce suddenly and unexpectedly became remote during the COVID-19 crisis.

Before COVID-19, Jeff and his team did a lot of face-to-face enrollments as their clients

preferred to see what they were being enrolled in. Now, with the digital experience provided by Ease, it is easy for Jeff and his team to screen-share during virtual meetings with groups and to continue to prove the same level of service and comfort to enrollees as they did before the workforce became remote.



Having the Ease team set up the connections for us was a huge help! Being able to say, 'Here's the case, group number, and carrier plan,' and it gets set up. The process is very seamless.

**Jeff Finn**

### About EaseConnect+

EaseConnect+ is a direct connection between Ease and carriers that is set up and managed by the Ease team. With EaseConnect+, benefits information is accurate, complete, and quickly flows between Ease and carriers, making enrollments and changes faster, easier, and more secure than paper forms.

### With EaseConnect+

- Easily activate carrier connections at your convenience.
- Safely and securely submit enrollment information directly to carriers.
- The Ease team will fully set up and maintain the connection for you.
- Count on the Ease team to send adds, terms, and changes, directly to carriers, creating a faster and more streamlined process for both you and your clients.

### To Get Started With EaseConnect+

For current Ease users, [click here](#). New to Ease? Contact [requestinfo@ease.com](mailto:requestinfo@ease.com) to set up a demo.

