

Re-Engineering Benefits for Maximum Results

Company Overview

This engineering firm was a prospect that came to us with 75 employees, struggling with rising health-plan costs, uneven employee engagement, and administrative burdens from multiple carrier relationships.

Key Challenges

This prospect faced double digit premium increases for the third consecutive year. Younger staff valued flexibility and digital tools, while older employees prioritized predictable coverage and robust networks. The HR team lacked the time and data to evaluate plan performance or educate staff effectively.

MBA Solution Presented

Working under direction from our team, the company implemented a tiered funding strategy combining a level-funded medical plan with a voluntary ICHRA option for remote workers. Ancillary benefits, such as dental, vision, and life, were consolidated under a single carrier to streamline administration. A digital enrollment platform was introduced, enabling side-by-side plan comparisons and real-time cost transparency.

To enhance engagement, we directed the firm to launch a quarterly “Wellness & Wallet” session covering preventive care, HSA optimization, and financial wellness. Metrics such as utilization, claims trends, and employee satisfaction were tracked to measure ROI.

Measurable Results

Within the first plan year, premium growth was reduced from 12% to 4%, 83% of employees reported improved understanding of their benefits, and HR administrative time dropped by 40%. These results demonstrate that mid-sized employers can achieve meaningful savings and retention gains by aligning funding strategies with workforce demographics, simplifying administration, and promoting benefits literacy through data-driven engagement.