

# ELITE-VB LLC

## END TO END CONSULTING SERVICES

1. **Discovery:** Consulting analysis of current benefits (core, voluntary, ancillary) as well as current and long-term goals:
  - Provide an overview of what is possible (Elite-VB “Five-Star Solution”)
  - Conduct client discovery to determine approach
2. **Analysis:** Demographic profiling and Benefit Delivery Analysis:
  - Incorporate statistically validated buyer profiles for voluntary benefit options
  - Identify best practices for communication and enrollment methods (pre-enrollment through post-enrollment)
  - Determine what strategically marries or enhances current employer benefit delivery
3. **Strategy:** Provide options of plans and enrollment options (non-disclosure form signed):
  - Recommend VB strategy for 3-5 years based on discovery
  - Recommend “best in class” carrier(s) & enrollment options
  - Technology strategy: Ben Admin / Carrier platform / other
  - Client signs off product and carriers for bidding process
4. **RFP:** (As needed) Based on the benefit goals and scope with client
  - Carrier and vendor submission, analysis, negotiation, and recommendations
  - Present RFP to client
  - Enrollment timeline prepared (60 days out through post-enrollment)
  - Client signs off on carrier & contract
5. **Execution of Plan:**
  - Confirm tactical plan of implementation and timeline
  - Build out technology platform with carriers, test and re-test
  - Orchestrate content and delivery media of communications (virtual, digital, paper, text, web, etc.)
  - Manage communication process as well as any benefit counselor assignments (one-on-one to co-browse if needed) – daily reporting
  - Post implementation: return data to client and enrollment summary provided
6. **Post Enrollment and Service:**
  - Shift to new hire & claims servicing
  - On-going customer service for both client and policyholders
  - Reporting
  - On-going premium administration
  - 100% premium reporting and disclosure

**Delivering 100% custom solutions for maximum results**