

# Speeding the transfer of enrollment data for a national insurance program manager

## CHALLENGE

A national insurance program manager and advisor handled group medical, dental, vision, life, and disability data—and it was growing. Although it already had a carrier integration partner, it was becoming overwhelmed with the work of receiving, cleaning, and deploying enrollment data back to carriers, especially as the business expanded. The firm also struggled to perform any reconciliation or to efficiently manage and validate changes.

## APPROACH

We implemented Milliman Connect, a cloud-based solution that automates the transfer of data between point-of-sale benefits administrators and carriers. Milliman Connect imports, digitizes, transforms, and enriches output data to help unify organizations and simplify workflows—accurately, efficiently, and safely.

In less than a week, Milliman Connect introduced file and data transfer requirements, including file formats, client details, and plan designs. Immediately after each employer's enrollment event, the enrollment data was securely sent to Milliman Connect in Excel. From there, it was cleaned, tested, and securely uploaded to each carrier, in whatever form that carrier needed.

## IMPACT

Moving its data operations to Milliman Connect significantly reduced the firm's risks. Milliman Connect also improved enrollment and commission accuracy, enhanced client persistency ratios, and sped commission payments.

The biggest impact? Using Milliman Connect reduced the firm's IT expenditures by 40%.



40% lower expenses

The insurance program manager cut its IT spending thanks to **efficiencies gained** using Milliman Connect.

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