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Benefits Administration Assessment

Are you ready to optimize benefits administration, but you're unsure where to start? Before you make a plan for improvement, take a moment to evaluate your current processes. This assessment will help reveal where you stand and provide guidance on how to optimize benefits administration at any stage.

1 How would you describe your current benefits enrollment and administration process?

A) We're still primarily paper-based or using spreadsheets for enrollment and tracking.

B) We have some digital tools but they're disconnected—maybe payroll integration but manual data entry elsewhere.

C) We have an integrated benefits administration platform, but it feels outdated or limited in functionality.

2 What are your biggest frustrations during open enrollment (OE) season?

A) Drowning in paperwork, chasing down missing forms and manual data entry for days (or weeks!).

B) Spending countless hours troubleshooting system glitches and answering the same questions over and over.

C) Wishing we could provide more personalized guidance to help employees make better choices.

3 When it comes to benefits administration technology investment, which statement resonates most?

A) We need to see clear cost savings and efficiency gains before investing in new technology.

B) We're willing to invest if we can prove measurable improvements in employee satisfaction and administrative time savings.

C) We want to invest in innovation that positions us as an employer of choice, even if return on investment (ROI) takes time to materialize.

4 How confident are you in your team's capabilities to remain compliant with regulations such as ACA*, COBRA* and QMSCO*?

A) We're doing our best to meet regulatory requirements and hoping we don't miss anything important.

B) We meet basic compliance requirements but creating custom reports feels too time-consuming and error-prone.

C) We're compliant but it would be helpful to have additional resources to proactively identify compliance issues and automate processes like enrollment and required communication.

5 What best describes your current benefits data situation?

A) Data is scattered across multiple systems (or filing cabinets!) and getting a complete picture requires detective work.

B) We have good data but limited ability to analyze trends or generate actionable insights.

C) We have solid reporting but want to use predictive analytics and benchmarking to support strategic decisions.

6 Which statement describes your approach to benefits administration reporting?

A) We perform manual OE reporting to understand basic metrics such as benefit selections and demographics.

B) Our reporting is mostly manual, but covers key areas like OE, compliance and vendor management.

C) Most of our reporting is automated, but we'd like to dive deeper into the data to identify trends and cost-saving opportunities.

7 What do you consider the biggest challenge with your current benefits administration resources?

A) We don't have enough full-time resources and sometimes need to recruit other HR team members to help with benefits enrollment and administration.

B) We use a benefits administration module in our Human Capital Management (HCM) software or Human Resource Information System (HRIS), but our team is still burdened with a heavy workload.

C) We have enough resources to maintain our day-to-day processes, but we don't have time to optimize our benefits plan and analyze complex data.

Calculate Your Results

Total number of **A**'s	
Total number of **B**'s	
Total number of **C**'s	

*Affordable Care Act
*Consolidated Omnibus Budget Reconciliation Act
*Qualified Medical Child Support Order

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⦿ Mostly A's: The Foundation Builder

You're ready to go digital. For help with a successful digital transformation, consider your optimization priorities:

- **Digitizing processes:** Implement a core benefits administration platform to eliminate paper-based processes.
- **Integrating systems:** Ensure seamless connection between your payroll and HR systems.
- **Automating basic tasks:** Look for immediate time savings through automated enrollment and basic reporting.

⦿ Mostly B's: The Efficiency Optimizer

You're in a great place to level up. These optimization priorities are intended to help improve efficiency:

- **Technology integration:** Connect your existing digital tools for seamless data flow.
- **Employee self-service:** Reduce administrative burden by implementing robust self-service capabilities for your employees.
- **Enhanced reporting:** Upgrade to benefits administration platforms with advanced analytics and compliance reporting.

⦿ Mostly C's: The Strategic Innovator

You're ready to transform benefits administration into a competitive advantage. At this stage, focus on these optimization priorities:

- **Cost savings strategies:** Understand which factors may be contributing to wasteful spending, such as poor enrollment decisions or billing and payroll errors. Once you've identified these factors, you can start building a cost savings strategy.
- **Predictive analytics:** Use data science to optimize benefits mix and predict employee needs.
- **Personalized employee engagement:** Create ongoing benefits communications and guide your employees towards optimal health and financial decisions with tools like decision support and care navigation.
- **Benchmarking and optimization:** Leverage external data to continuously improve your benefits offerings.

Now that you've completed an assessment, you're likely better prepared to optimize your benefits administration processes. Our Benefits Administration Optimization Plan Template is intended to help create a positive benefits experience for your HR team and employees.

⟳ Download the Template

www.benefitfocus.com