

Benefits Administration Optimization Plan Template



Refer back to your results from the **Benefits Administration Assessment** and zero in on the customized plan for your starting point. This will help you translate those insights into a roadmap intended to help you transform your benefits administration.

Step 1: Set Goals

Identify which of the following categories you belong based on your assessment results. Then **choose your top three objectives** from that category to prioritize.



For Foundation Builders

If your team is burdened by benefits administration processes that are time-consuming, disconnected and inconsistent, start building an optimization plan with some of these goals:

Automate ____% of our benefits administration processes.

Document a plan to maintain regulatory compliance.

Transfer physical documents to digital formatting.

Other: _____

Identify ____ opportunities for employee self-service.



For Efficiency Optimizers

Your benefits administration processes may be “good enough”, but some of these goals can help drive more efficiency in your program:

Reduce HR team hours spent on benefits administration by ____%.

Decrease benefits-related support tickets by ____%.

Integrate benefits platform with HRIS/payroll systems.

Develop a reporting strategy with meaningful and recurring data that drives action in your benefits program.

Improve employee satisfaction scores by ____%.

Other: _____



For Strategic Innovators

Your team is ready to use technology and data to optimize the benefits experience for administrators and employees. Consider choosing some of these goals for your benefits administration strategy:

Implement tools for personalized benefits guidance.

Develop messaging to position benefits as competitive advantage for talent acquisition.

Increase the number of employees selecting optimal benefits plans by ____%.

Create a strategy to mitigate ____ factors of wasteful spending.

Leverage predictive analytics for benefits planning.

Other: _____

Create a schedule for year-round benefits communications.

Step 2: Set Budget and Allocate Resources



After you determine your goals, calculate the budget and resources you'll need for your optimization plan. Consider budgeting for a comprehensive benefits administration provider, which can be an effective tool to support a variety of optimization goals.

Gather estimated costs for:

Platform licensing \$ _____	Implementation services \$ _____	Training and change management \$ _____
Integration costs \$ _____	Contingency (10-15%) \$ _____	Other \$ _____

Pro-tip:

If you need to request a budget for a new or upgraded benefits administration solution, be prepared to illustrate the return on investment (ROI) to your financial stakeholders. Use our playbook **How to Make the Business Case for a New Benefits Administration Solution in 5 Steps** and learn practical tips on identifying the ROI for different stakeholders.



In addition to financial cost, create a projection of the human power necessary for your project. Here's an example of the roles and responsibilities that may need to be involved:

HR Benefits Lead/Manager	Owns the project and day-to-day benefits administration
HRIS/HR Systems Administrator	Manages technical configuration and system integration
IT Security/Compliance Officer	Ensures data security and regulatory compliance
Payroll Manager	Coordinates benefits deductions and payroll system integration
Finance/Accounting Representative	Manages budget and vendor payments
Employee Communications/Internal Comms Lead	Develops change management and employee messaging
Legal/Compliance	Reviews contracts and ensures regulatory adherence
Employee Representatives Champions	Serve as pilot users and provide frontline feedback

Step 3. Develop Implementation Roadmap for New Benefits Technology

Each organization should set their timeline according to their unique goals and available resources. The implementation timeline below can be used as a guide, regardless of your starting point and specific objectives.



PHASE 1: Planning & Selection

Weeks 1-8

Weeks 1-2:

Finalize requirements and stakeholder buy-in.

Weeks 3-4:

Research and shortlist vendors.

Weeks 5-6:

Conduct vendor demos and reference checks.

Weeks 7-8:

Make selection and negotiate contract.



PHASE 2: Implementation

Weeks 9-20

Weeks 9-10:

Project kickoff and data preparation.

Weeks 11-14:

System configuration and testing.

Weeks 15-17:

Employee communication and training.

Weeks 18-20:

Soft launch and troubleshooting.



PHASE 3: Optimization & Scale

Weeks 21+

Month 6:

First major assessment and optimization.

Month 12:

Annual review and advanced features rollout.

Ongoing:

Continuous improvement based on feedback.

Creating an optimization plan and partnering with a benefits administration provider can be an effective strategy, regardless of your goals. **Learn a simple, three-step process** that can help you choose the right provider for your needs.



[Learn more](#)

