





Managing Stakeholder Expectations When Outsourcing Leave Administration

*Kayla Carter, MSPM, CSM, CSPO, CLMS
Sr. Account Executive, ReedGroup, an Aflac company*
*Megan Horner, MBA
First Vice President Consultant, American Benefits Consulting*
*DeShawna Manley, MBA
Director, National Benefits, PwC*
August 15, 2023




1







Kayla Carter
Sr. Account Executive, ReedGroup an Aflac company
Kayla started with ReedGroup in 2021. She brings 8 years of group insurance knowledge to her role. She currently manages a portfolio of clients that vary in size from 7,500 to 40,000+ lives.



Megan Horner
First Vice President, American Benefits Consulting (ABC)
Megan joined ABC in 2021 specializing in absence, disability and life consulting. She has been in the group employee benefits field since 2008. Her experience crosses industries including healthcare, manufacturing, retail and financial services.



DeShawna Manley
Director, PwC
DeShawna is an absence management professional with 10 years of industry experience. She has worked in many aspects of the absence management landscape to include claims management and consulting. She currently oversees absence and ancillary benefit programs for PwC's more than 50k covered lives.




2



Our Agenda


- Who are your stakeholders?
- What enhancements does a vendor relationship bring?
- Change management when the stakeholder landscape is modified
- Q&A



3

Polling


- Do you?
 - Insource
 - Co-Source
 - Outsource



4

Polling

- What is the size of your company?
 - Under 5k
 - 5k-10k
 - 10k+



5

Current state assessment

Data Assessment
How is data currently reported and tracked? How many employees utilize leaves and for how long?



Employee Experience
What is the experience for the internal team managing leave of absence? What is end-to-end experience for employees using leave?





Current State Assessment

Process Review
How are programs currently being managed - medical management, forms, customizations, etc.?



Pain Points / Wish List
What works well today and what could be improved? What is the ideal future state?





6


Outsourcing Considerations

Advantages:

- Better ensure regulatory compliance
- Improved consistency in administration (process and decisions)
- Access to expert resources (legal, clinical, vocational, etc.)
- The ability to implement best-in-class options that an employer may not be able to offer, including telephonic or web intake, automatic notifications, online access to information/reporting
- Better outcomes, including reduced absenteeism

Limitations

- Potentially higher administrative costs
- Less flexibility to support customized processes and/or program design
- May be more employee "noise" when employees interacting with a vendor vs. internal staff (may be higher denial rates, fewer exceptions, vendor less familiar with employer culture and offerings)



7

Who are the stakeholders?




8

Stakeholder Matrix

Influence/Power of stakeholders ↑	High Power, Low Interest Meet their needs Keep Satisfied	High Power, High Interest Key player Engage Closely
	Low Power, Low Interest Least important Minimal effort	Low Power, High Interest Show consideration Keep Informed
	Interest of stakeholders →	

High Power, Low Interest

- Employees
- Executive Leadership

Low Power, Low Interest


- HR Reps
- Legal
- Compliance
- Payroll

High Power, High Interest

- Director of Absence Benefits
- LOA Team

Low Power, High Interest


- IT
- Project Manager
- Consultants



9

Stakeholder Involvement During Implementation


Months	Activities and Milestones	Business Resources	Technology Resources
Plan	1 Implementation Kickoff Project Schedule	High	Low
Design	2 Review policy, notification requirements, define change management strategy	High	Moderate
Build	3-4 System configuration, eligibility file, QA testing	Low	High
Test	5 Performance acceptance testing	Moderate	Moderate
Deploy	6 Perform change management strategy, manager/HR training	Moderate	Moderate
Live	Go-live	High	Low




10

Engagement Strategy


- Partnership
 - Include them in the decision making
- Participation
 - Give them specific tasks
- Consultation
 - Collect feedback
- Push Communications
 - Keep informed through email
- Pull Communications
 - Inform Passively



11



Q&A



12
