



CASE STUDY

Learn how The Rowley Agency
increased voluntary life enrollment
and reduced errors by 50%+ with
Employee Navigator

Challenge

With offices in New Hampshire, Maine, and Vermont, The Rowley Agency, a member of Assurex Global, has been an established presence in the northeast since 1966. The agency's personal approach and trusted guidance makes them unique, but as with many agencies who were relying on spreadsheets and manual administration they were stuck doing time-intensive error prone work for their clients. "Making sure that employees are enrolled in a timely manner on dozens of carrier portals, along with terminations, name changes, qualifying events, and everything else just wasn't scalable," said Travis Ingram.

To build an agency capable of growing and scaling successfully, The Rowley Agency needed a technology partner to reduce their administrative burdens, enhance the best aspects of their business, and support their customers with modern and innovative solutions. Recognizing this need, Assurex Global recommended they investigate Employee Navigator because it was being successfully used by dozens of other Assurex Global agencies. "We picked Employee Navigator because it was intuitive, our partners recommended it, and learning the nuances of four different systems wasn't feasible in the long run. We stuck with it and we're ultimately glad we did."

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Travis Ingram
The Rowley Agency

Never Out of Touch

With Employee Navigator, The Rowley Agency is living up to the full potential of its corporate motto, “never out of touch,” and has transformed into a one-stop shop for all things benefits. “A Director of HR from a prospective customer contacted me and said they had recently changed jobs and their new broker has no idea what they're doing with Employee Navigator, and they want to move to our agency. The fact that a potential customer was considering changing brokers because we know what we're doing with Employee Navigator says everything.”

Along with the inherent benefits of online enrollment, Employee Navigator’s modern carrier integrations have been a game changer, with MetLife being a standout. “When using the MetLife integration versus other standard 834 files, we've seen a more than 50% reduction in errors. Being able to manage EOI requests within the system and digitally transmit them to the carrier is an added bonus.” Not only has the agency been able to reduce errors by more than 50% and streamline internal processes, but they've also delivered the employee and HR experience that today’s clients demand. “The end experience plus the integrations like MetLife makes our job and HR’s job much easier. Clients truly recognize the value once they're in place because it takes away most of the administrative burden.” With the flexibility to support both big and small groups and deliver superior features all from a single platform, Employee Navigator has undoubtedly brought clients closer to the agency.

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Results

Benefits usage has exploded, and The Rowley Agency has seen steady growth year-over-year. For one client in particular, Travis noted that “we went from barely meeting participation requirements to well over 50% of the employees enrolling in voluntary life because it was so easy.”

But the benefits of the software do not end with a single client. “We've seen an uptick in voluntary life enrollment across our entire book of business when compared to when we were doing paper enrollments. The carrier and payroll integrations have helped us holistically in every way possible.” The Rowley Agency’s dedication, passion, and benefits knowledge has allowed them to grow into one of the largest independent insurance agencies in northern New England; and as the industry embraces digitization, Employee Navigator is the tool they'll use to scale this vision for the modern era.

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Travis Ingram
The Rowley Agency