

What happens when open enrollment questions surge? For this cloud-based solutions provider, the answer was adding an always-on AI assistant to support its team — delivering faster guidance and reducing HR escalations by 70%.

The challenge

Open enrollment is often the moment of truth for benefits strategy.

At this cloud-based security solutions provider, employees had to evaluate plan options, understand eligibility rules and weigh cost trade-offs across a robust total ecosystem to make confident enrollment decisions. While the organization had invested in a dedicated open enrollment experience website with comprehensive benefits content, employees still struggled to find the right information when making their decisions.

Without clear, immediate answers, hesitation can set in. Questions increase. Outreach to HR surges. During open enrollment, even simple questions can quickly snowball, adding pressure to HR and benefits teams already managing peak workloads in their busiest time of year.

The organization needed a more effective approach to supporting employees through enrollment — one that scaled support, reduced uncertainty and allowed HR teams to stay focused when it mattered most.

Our solution

Our team understood that the real challenge wasn't access to information — it was helping employees find the right answers at the moment enrollment decisions were being made.

In collaboration with the organization, we enhanced the existing open enrollment experience website by embedding a new, always-on AI assistant. The goal of the AI assistant wasn't more content, but better connection — meeting employees where they were with timely, accurate guidance.

Together, we analyzed how employees navigated enrollment, where confusion emerged and which questions slowed decision-making. The AI assistant was trained exclusively on this organization's benefits materials, ensuring responses were accurate, secure and fully aligned with their programs and resources.

Available 24/7, the assistant delivered plain-language answers, cited internal source documents and suggested relevant follow-up questions — allowing employees to stay focused throughout the process.

All of this was achieved on an accelerated timeline, with the solution launched in eight weeks to meet a firm open enrollment deadline without disrupting the existing experience or compromising security.

The results

The impact was immediate and measurable from the start of the open enrollment window.

Thanks to the AI assistant, employees were able to get answers faster, reducing the need to search across pages or pause decisions while waiting for support. As self-service usage increased, pressure on HR and benefits teams eased significantly.

HR escalations dropped by approximately 70 percent year over year. The few escalations that did occur were largely tied to systems outside the AI assistant's scope, reinforcing the effectiveness of the solution.

At the same time, the organization gained a clearer understanding of employee needs. Usage analytics uncovered recurring question topics, navigation patterns and content gaps — insights that are shaping future enrollment strategies and communications.

Beyond the immediate open enrollment window, the work of the AI assistant had broader impact.

Engagement was strong when benchmarked against other tech organizations and helped position the client as an innovator in benefits technology. Building on this success, the organization is now exploring expanded functionality across its total rewards website.

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