



Unum Enroll Overview

The important role of benefits communication

A Unum study reveals:¹

- ▶ As economy begins to recover, an effective benefits education strategy is more important than ever
- ▶ There's a strong link between employee education and worker satisfaction

You can maximize your benefits investment with effective employee benefits education:

- ▶ Using the 3+3 communication strategy, a proven combination of tools and timing
- ▶ At little or no added cost



¹ Unum, "Employee Education and Enrollment Education Survey," January 2010.

Unum Enroll: providing benefit education services

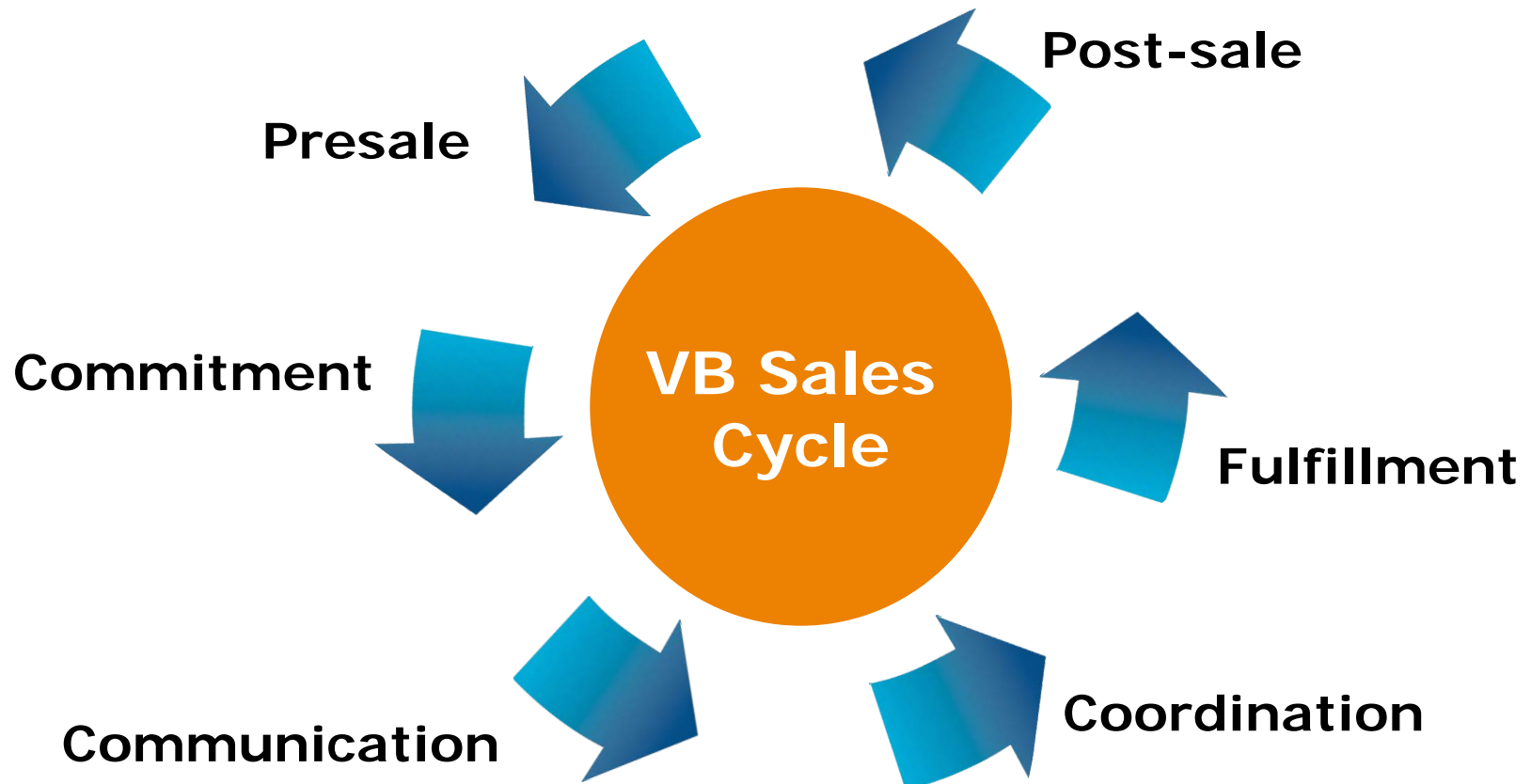


The Unum Enroll organization is a face-to-face enrollment delivery system specializing in cases <500 lives:

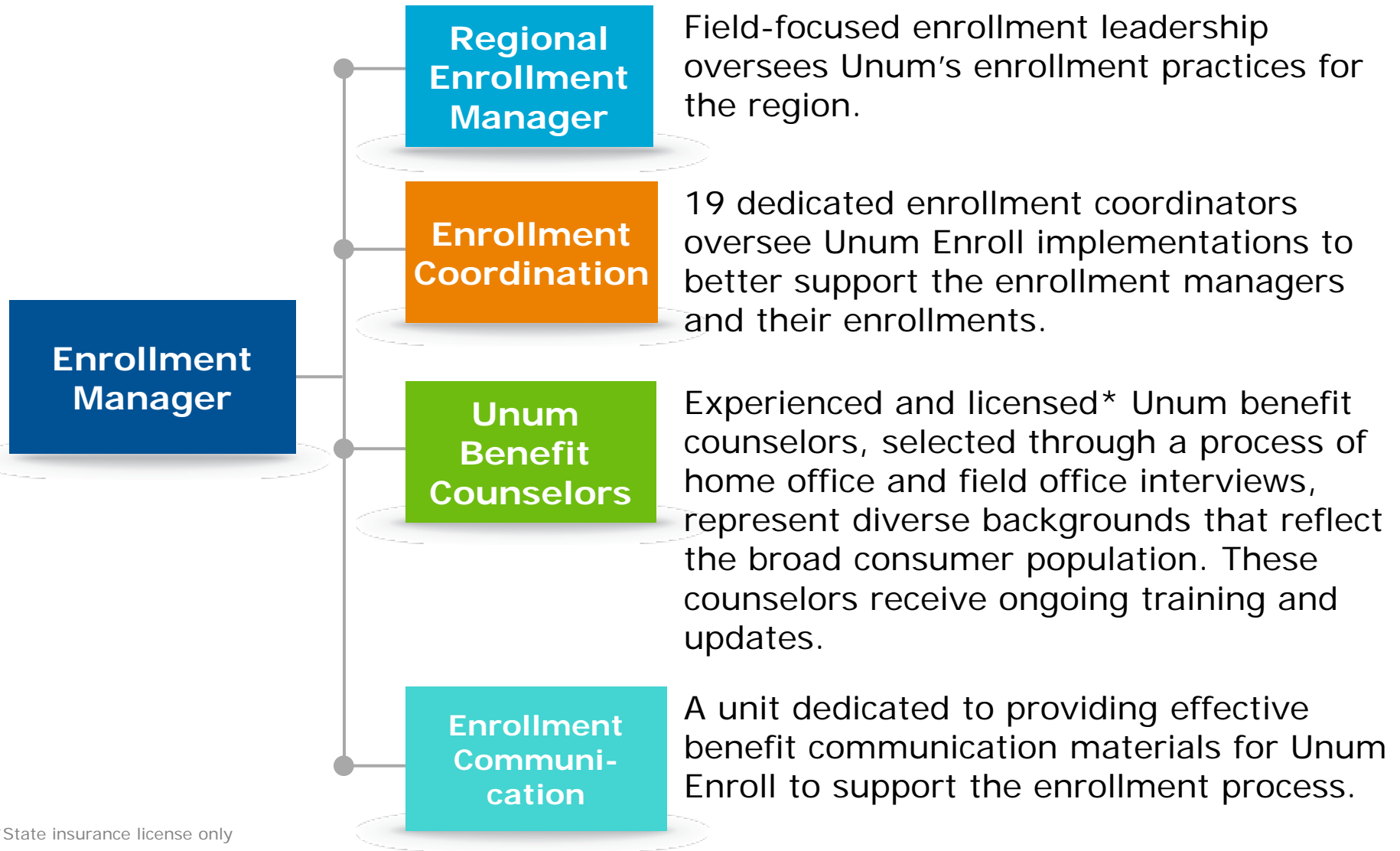
- ▶ Enrollment manager support at the local level
- ▶ A national network of 250+ Unum benefit counselors
- ▶ Benefit education services including telephonic enrollment capability
- ▶ Communication services
- ▶ Enrollment technology



VB sales cycle: a unique sales process



Enrollment manager support



*State insurance license only

Benefit counselor network

What Unum benefit counselors do for you

- ▶ Make your benefits enrollment process smooth and professional
- ▶ Deliver needs-based presentations and one-on-one sessions to educate customers and their employees
- ▶ Provide Webinar/DataXchange capabilities to communicate with and educate employees about the benefits available to them

Why Unum benefit counselors are effective

- ▶ Well trained
- ▶ Education focused
- ▶ Geographic reach
- ▶ Customer satisfaction
- ▶ Bilingual abilities



Unum benefit counselor profile data

The screenshot shows a web browser window displaying the Unum Benefit Counselor Website. The page features the Unum logo and the text "Benefit Counselor Website" and "Meeting Customer Needs". A navigation bar includes links for Home, Archives, Current News, Resources, Reporting Tools, Reference Guide, and LINK System. The main content area is titled "View Benefit Counselor Profile" and displays a detailed profile for Richard (Dick) L'Heureux. The profile includes fields for employee ID, name, office, SSN, address, city, state, zip code, home and work phone numbers, pager and cell phone numbers, fax number, primary and secondary email addresses, plane.biz username, employment status, hire and termination dates, audience, enrollment scenario, classification, laptop usage, connectivity type, region, bilingual status, travel, core enrollment experience, unavailability dates, training, state licensing, hire source, background data, performance feedback, and interview statistics. To the right of the profile is a vertical column of buttons: Update, Delete, Create Profile, Show Profiles, Reports, and Log Off.

Unum Employee ID:	15118
Name:	Richard (Dick) L'Heureux
Field Office:	Portland
SSN:	xxx-xx-6789
Address:	One Turkey Run
City:	Topsham
State:	ME
Zip Code:	04086
Home Phone:	207-721-9629
Work Phone:	207-575-8401
Work Extension:	5-8401
Pager Number:	
Cell Phone:	207-751-5866
Fax Number:	
Primary Email:	RLheureux@unumprovident.com
Secondary Email:	oneturkeyrun@suscom-maine.net
plane.biz Username:	rlheureux
Employment Status:	Active
Hire Date:	6/19/1995
Termination Date:	
Termination Reason:	
Audience:	All Audiences
Enrollment Scenario:	All Scenarios
Classification:	Executive Benefit Counselor
Has UP Laptop:	Yes
Connectivity Type:	High-speed/DSL
Region:	MidAtlantic
Bilingual (Language):	Not Bilingual
Travel:	National
Core Enrollment Experience:	Full Core w/Campus
Unavailability Dates:	View Dates
Training:	View History
State Licensing:	View License Info
Hire Source:	Rehire
Background Data:	View Data
Performance Feedback:	View Feedback
Interview Statistics:	View Interview Statistics

Update
Delete
Create Profile
Show Profiles
Reports
Log Off

Unum benefit counselor reporting capabilities

The screenshot displays the Unum Benefit Counselor Website interface. At the top, the Unum logo and the text 'Benefit Counselor Website' are visible, along with the tagline 'Meeting Customer Needs'. A navigation menu includes links for Home, Archives, Current News, Resources, Reporting Tools, Reference Guide, and LINK System. The main content area is titled 'Benefit Counselor Reporting' and features a 'Select Report' section. This section contains a 'Report Type' dropdown menu with the following options: Custom Combination Data Report, Benefit Counselor Field Office Report, Benefit Counselor Classification Report, Benefit Counselor Bilingual Report, Benefit Counselor Unum Asset Report, Benefit Counselor Training History Report, Benefit Counselor Regional Report, Benefit Counselor Licensing Report, and Benefit Counselor Unavailability Report. To the right of the dropdown are buttons for 'Create Profile', 'Show Profiles', 'Reports', and 'Log Off'. A 'Next' button is located below the 'Report Name' and 'Report Heading' input fields.

Enrollment Managers can choose from predetermined performance type selections.

Telephonic enrollment: a complement to face-to-face

Unum provides support to complement one-on-one enrollments through a specialized call center:

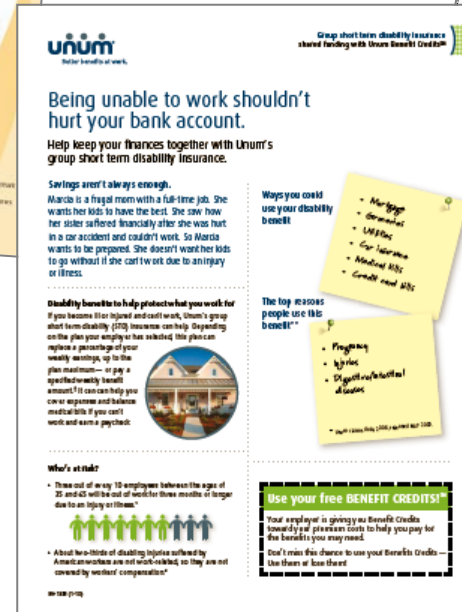
- ▶ Staffed by Unum benefit counselors licensed to sell insurance in 50 states with extensive knowledge of the customer's benefits program
- ▶ Includes bilingual services
- ▶ Handles inbound customer calls on supplemental and group benefits 8:00 a.m. to 8:00 p.m. EST
- ▶ Supports other employer-provided benefits – beyond Unum benefits
- ▶ Captures enrollments electronically through Voice Stamping Authorization Technology



Employee education materials

Choose from our employee education materials which can be co-branded

- ▶ One-page flyers
- ▶ Benefit booklets
- ▶ Posters
- ▶ Postcards – direct mail
- ▶ Customized e-comms/landing pages
- ▶ Enrollment meeting presentations
- ▶ Payroll stuffers
- ▶ Benefit statements



Employee education materials in Spanish

A wide choice of materials in Spanish can also be co-branded

- ▶ One-page flyers
- ▶ Benefit booklets
- ▶ Posters
- ▶ Postcards – direct mail
- ▶ Customized e-comms /landing pages
- ▶ Enrollment meeting presentations
- ▶ Payroll stuffers
- ▶ Benefit statements
- ▶ Product videos



plane.biz: customized for your company

plane.biz enrollment

Alpha Research, Inc. - DEMO

Employers | Employees | Personal Information | Dependents | Beneficiaries | Contacts | Reports | Logout

Text size: A A A

Benefits for



Assistance

All required fields must be entered prior to selecting **Continue**.

If you need to make changes to any non-editable fields, please use your [Contacts](#).

Modify your [Dependent](#) information.

Modify your [Beneficiary](#) information.

Personal Information

Your employer has provided Unum with personal and employment details that we use to help determine the types and benefit amounts of insurance coverage available to you.

Please review your Personal Information below and make any changes necessary. Also remember to check your Dependent and Beneficiary information by clicking on the links at the left. When you have finished updating your information, or if you have no changes, click **Continue** at the bottom of the page.

Personal Information

General

SSN:	<input type="text" value="123-45-6789"/>	*
First Name:	<input type="text" value="Clark"/>	*
Middle Name:	<input type="text"/>	
Last Name:	<input type="text" value="Kent"/>	*
Date of Birth:	<input type="text" value="03"/> / <input type="text" value="16"/> / <input type="text" value="1951"/>	*(mm/dd/yyyy)
Gender:	<input type="text" value="Male"/>	*
Class:	<input type="text" value="Executive"/>	*
Location:	<input type="text" value="Home Office"/>	*
Preferred Language:	<input type="text"/>	
Interview Language:	<input type="text" value="English"/>	

Address

Address:	<input type="text" value="123 Main Street"/>	*
Address 2:	<input type="text"/>	
City:	<input type="text" value="New York"/>	*
State:	<input type="text" value="New York"/>	*
Zip Code:	<input type="text" value="12345"/>	*

Your company name and logo is displayed

plane.biz: personalized for your employees

plane.biz enrollment

Alpha Research, Inc. - DEMO

Employers | Employees | Personal Information | Dependents | Beneficiaries | Contacts | Reports | Logout

Text size: A A A

Benefits for:
Kent, Clark



Benefit Summary

Your employer is giving you the opportunity to enroll in the following coverage options to help provide the additional financial protection you and your family may need. Read on to learn more about the coverage being offered specifically to you.

Your Benefit Options

Click on the appropriate link to view a summary of your benefit options, learn more about the insurance coverage, begin the process, or to decline coverage.




Printer Friendly

Selection Status

To complete your enrollment/application, please make your selections for all required benefits.

Assistance

A red arrow  to the left of a benefit indicates that you are required to make a selection.

Benefit Summary	Status:			
Product	Selection Status	Employee	Employer	Total
Voluntary Interest-Sensitive Whole Life Insurance		--	--	--
		OPT-OUT	LEARN	APPLY
Voluntary Renewable Term Life Insurance		--	--	--
		OPT-OUT	LEARN	APPLY
Voluntary Specified Critical Illness Insurance / Specified Disease		--	--	--
		OPT-OUT	LEARN	APPLY
Voluntary Individual Short Term Disability Insurance / NYSTD		--	--	--
		OPT-OUT	LEARN	APPLY

Employees will see only the benefits they are eligible to receive

Insurance products are underwritten by the subsidiaries of Unum Group.

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