

## Southwest Energy Company – Business and Benefits are Booming!

### CASE STUDY

### Background

As their business continues to grow rapidly, this energy company is faced with the critical challenge of attracting and retaining employees. Like most large employers, they understand that benefits are an important part of the employee's total compensation. The difficulty is making sure employees understand all that is available to them, and helping this "always on the go" group make good decisions for their families. Add to that the fact that the employees are located in the field at multiple rig sites, with demanding schedules, and in remote locations, Endeavor Energy Resources (Endeavor) knew they needed help and enlisted the services of Hodges-Mace Benefits Group.

### Objectives

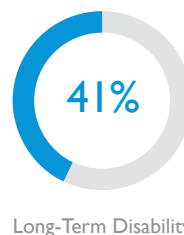
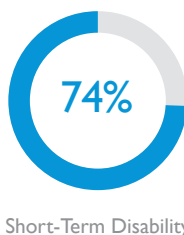
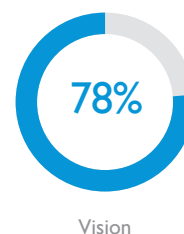
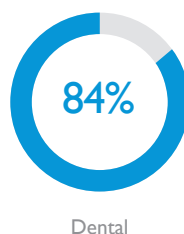
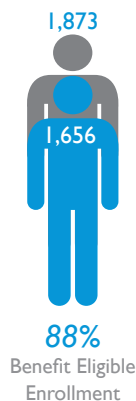
With help from their employee benefits consultant and Hodges-Mace, Endeavor identified specific goals related to the delivery and promotion of their employee benefits program. Everyone on the team knew that Endeavor was making an investment by pulling employees off of the rigs for 30 minutes. The collective charge was to make it worthwhile.

- First and foremost, remind employees that there was no premium increase for medical. Also, premiums were going down on the dental and vision plans.
- Acknowledge the fact that their workers have demanding jobs and may not a lot of time to educate themselves about insurance. Help employees make good decisions.
- As the health care delivery system evolves, educate employees about alternatives, such as TeleDoc and On-Site Clinic services, that are available to them and their families.
- Expand the menu of benefits with the responsible introduction of supplemental benefits – Accident, Critical Illness and Permanent Life insurance.
- It was important to Endeavor that all employees receive the same level of "high-touch" service, regardless of their worksite. The charge was to "get out there and see them." (Oh yeah, and those rigs move from time to time, so you have to be flexible.)

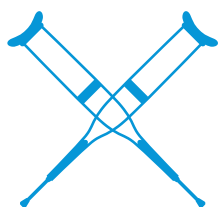
### Action Steps:

- **One-to-One Engagement and Enrollment Strategy:** Employee Benefits Counselors were deployed to meet with employees on site at the many rigs. The counselors went armed with laptop computers, printers and educational materials as they completed each enrollment electronically. With the help of the management team at each location, employees came off the rig one at a time to meet with their dedicated counselor resource. Eighty-eight percent of employees met one-to-one with a counselor.
- **Custom Benefit Guides and Posters:** The team at Hodges-Mace worked closely with the three divisions of Endeavor to develop benefit guides and announcement posters for each. Once finalized, the guides were produced to meet the needs of both English and Spanish speaking employees.
- **Comprehensive Benefits Counselor Training:** Prior to the start of annual enrollment, Hodges-Mace led the client-specific training for the team of 16 Benefits Counselors. Over two days, training included an in-depth review of a customized resource manual, online system testing, role plays and practice enrollments. The goal was to ensure the counselors were well prepared to meet with that first employee on day one. Everyone knew the importance of creating a great first impression.
- **Flexible Scheduling:** Knowing there were so many remote locations, mobile rigs and dynamic shifts, our team coordinated the one-to-one schedules to meet the needs of each rig. If for some reason an employee was not able to meet with a counselor on site, a phone enrollment was scheduled to ensure that employee received the same high-level of service.
- **Data Management:** Everyone on the team acknowledged the fact that the whole project could go great, but the data needed to be delivered to payroll accurately and in a timely fashion. PlanSource is the payroll system used by Endeavor and would only accept the data in a custom layout.

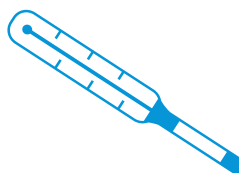
### Enrollment Statistic Results:



### Voluntary Benefits Participation



68%  
Group Accident



43%  
Critical Illness (EE)



43%  
Permanent Life Insurance

### Survey Results

Employees were surveyed after enrollment. 90% of employees that met with a counselor filled out a survey.



99% of employees who met with a counselor said "the counselor was a good teacher, provided good advice and I left the session better educated about my benefits."



93.7% said the Benefits Counselor explained the importance of participating in the Wellness Program.



99.5% agreed that after enrollment they felt like they had a better understanding of ways to spend their benefit dollars wisely.

"I really can't thank you all and everyone at Hodges-Mace enough for a great enrollment this year. We were very impressed and look forward to next year's enrollment and partnership with Hodges-Mace." ~ Benefits Manager

"Gordon is an amazing counselor and explained everything to where I could understand it to the fullest. I appreciate the time he took to explain everything to me." ~ Endeavor Employee