

What problem are you solving

Clearly define the pain point or gap in your current benefits.

- Are you seeing increased claims or costs in a specific category?
- Do employees struggle to navigate their benefits or get timely support?
- Are engagement or satisfaction levels (NPS, CSAT) low?
- Are point solutions under utilized?

What can AI change?

Define the expected impact AI could have on the problem.

- Can it improve the speed and personalization of benefit guidance?
- Can it drive smarter triage
- Can it reduce your team's administrative load?
- Can it nudge members to act?

What can you measure?

Identify the KPIs to track both direct and indirect impact.

- Engagement: % increase in solution utilization?
- Service: reduction in benefits team inquiries or support tickets
- Experience: change in NPS/CSAT scores
- Cost: impact on claims or unnecessary utilization
- Timeliness: % of questions answered within seconds or first touch

What does success look like?

Define what a win looks like and how you'll know it's working.

- Higher engagement in underused solutions
- Better employee experience
- Fewer manual tasks for the benefits team
- Clear ROI