

Employer Portal (Benefits Administrator)

Executive Summary

I led the end-to-end strategy and launch of an Employer Portal that improved transparency, reduced operational friction, and increased employer satisfaction for a benefits administrator serving self-insured employers.

As the company's first product hire, I prioritized an employer-centric solution that introduced automated eligibility management, self-service reporting, and secure access to member data, supported by a newly built data and analytics foundation.

The launch reduced enrollment errors by 10-15%, cut Client Success analytical workload by over 50%, and improved employer satisfaction by 5-10%, while establishing a scalable foundation for future self-service capabilities.

Context

The company administered health benefits for small to mid-sized self-insured employers using a differentiated model: members received a single consolidated monthly statement, while the Benefits Administrator paid providers directly within 30 days. This reduced provider bad debt and accounts receivable while simplifying the member experience.

The model delivered a 10–20% reduction in employer claims costs in the first year, alongside lower member costs and improved satisfaction.

Strategy

As the first product hire, I assessed the maturity of the existing product portfolio through stakeholder interviews and a product maturity model that mapped current capabilities against customer expectations. This analysis surfaced a consistent theme: employers lacked real-time

visibility and self-service tools, creating avoidable errors, operational drag, and erosion of trust, despite a strong underlying cost-saving model.

I defined an Employer Portal strategy focused on increasing transparency and reducing reliance on manual workflows. The core feature set included:

- Automated eligibility management with file ingestion and mapping
- External-facing reporting focused on membership and spend
- An employer-centric view of member data, aligned with the Member Portal and configurable to protect sensitive information

I partnered with leadership to prioritize this initiative against competing platform requests, tying the investment directly to our OKR around employer referenceability and sales enablement.

Execution

To guide delivery, I defined the target maturity for an initial Simple, Lovable, and Complete (SLC) release and established success metrics centered on operational workload reduction and employer satisfaction.

I worked closely with employers and internal stakeholders to define requirements and conduct beta testing once features were demoable. This resulted in a new eligibility management experience that significantly simplified enrollment file ingestion and mapping.

ELIGIBILITY FILE REVIEW										
SELECT MONTH		STATUS View All		< >		REFRESH FILES				
FILE NAME	UPLOADED DATE	UPLOADED BY	STATUS	TOTAL MEMBERS	CHANGES	ERRORS	QUARANTINED	VALIDATED	PROCESSED	
BEST-SDC(2).xlsx	Oct 2, 2019, 3:48:49 PM	HA Claim and 835 Files	Processed	4	4	0	0	0	4	→
BEST-SDC(1).xlsx	Oct 2, 2019, 1:36:50 PM	HA Claim and 835 Files	Processed	3	3	0	0	0	3	→
BEST-Emphchange.xlsx	Sep 26, 2019, 9:46:18 AM	HA Claim and 835 Files	Validated	8	8	0	0	8	0	→
BEST-Terms_(2).xlsx	Sep 26, 2019, 9:45:04 AM	HA Claim and 835 Files	Processed	8	5	0	0	0	8	→
BEST-Terms_(2).xlsx	Sep 26, 2019, 9:32:48 AM	HA Claim and 835 Files	Processed	8	5	0	0	0	8	→
BEST-Terms(1).xlsx	Sep 25, 2019, 11:16:52 AM	HA Claim and 835 Files	Processed	8	8	0	0	0	8	→
BEST-Terms(1).xlsx	Sep 25, 2019, 11:12:09 AM	HA Claim and 835 Files	Rejected	8	0	8	0	0	0	→
BEST-FL.xlsx	Sep 25, 2019, 10:57:43 AM	HA Claim and 835 Files	Processed	5	4	0	0	0	5	→
BEST File v2.csv	Sep 24, 2019, 4:48:46 PM	HA Claim and 835 Files	Rejected	4	0	4	0	0	0	→
BEST File.csv	Sep 24, 2019, 4:46:27 PM	HA Claim and 835 Files	Rejected	4	0	4	0	0	0	→
BEST-EHT(8).xlsx	Sep 24, 2019, 10:51:24 AM	HA Claim and 835 Files	Processed	2	2	0	0	0	2	→
BEST-EHT(7).xlsx	Sep 23, 2019, 3:08:10 PM	HA Claim and 835 Files	Validated	9	0	1	0	8	0	→
BEST-EHT(6).xlsx	Sep 23, 2019, 12:16:46 PM	HA Claim and 835 Files	Processed	8	1	0	0	0	8	→
BEST-EHT(5).xlsx	Sep 23, 2019, 12:01:57 PM	HA Claim and 835 Files	Processed	8	8	0	0	0	8	→
BEST-EHT(4).xlsx	Sep 20, 2019, 10:26:02 AM	HA Claim and 835 Files	Processed	9	2	0	0	0	9	→
BEST-EHT(3).xlsx	Sep 20, 2019, 10:17:25 AM	HA Claim and 835 Files	Processed	8	8	0	0	0	8	→
BEST-EHT(2).xlsx	Sep 19, 2019, 2:25:19 PM	HA Claim and 835 Files	Processed	8	8	0	0	0	8	→

I also led the transition from manually produced reports to a self-service analytics platform. This included selecting Looker as the reporting tool, helping define and build a supporting data lake, configuring standard employer reports, and rolling out the platform to both employers and internal teams.

Total Claims Spend				
Data dictionary for details can be found at https://tinyurl.com/y3kfz8go				
Download Data...				
Claim Type	Billed \$	Allowed \$	Plan \$	Claim Details
Medical	\$3,805,500	\$1,275,214	\$1,123,072	Click To See Details ...
RX	\$1,596,154	\$435,790	\$409,404	Click To See Details ...
Totals	\$5,401,654	\$1,711,005	\$1,532,476	

Outcomes

The Employer Portal delivered measurable improvements across operational efficiency and employer experience:

- Reduced member enrollment errors by 10–15%
- Reduced Client Success analytical time by over 50%
- Improved employer satisfaction by 5–10%

These outcomes lowered operational costs, improved renewal confidence, and strengthened employer referenceability, directly supporting sales growth.