

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		FILE LIST						
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 B35 Files	Processed	4	4	0	0	0	4
BEST-SDC(1).xlsx		Oct 2, 2019, 1:36:50 PM	HA Claim and B35 Files	Processed	3	3	0	0	0	3
BEST-Empchange.xlsx		Sep 26, 2019, 9:46:18 AM	HA Claim and B35 Files	Validated	8	8	0	0	8	0
BEST-Terms_(2).xlsx		Sep 26, 2019, 9:45:04 AM	HA Claim and B35 Files	Processed	8	5	0	0	0	8
BEST-Terms_(2).xlsx		Sep 26, 2019, 9:32:48 AM	HA Claim and B35 Files	Processed	8	5	0	0	0	8
BEST-Terms(1).xlsx		Sep 25, 2019, 11:16:52 AM	HA Claim and B35 Files	Processed	8	8	0	0	0	8
BEST-Terms(1).xlsx		Sep 25, 2019, 11:12:09 AM	HA Claim and B35 Files	Rejected	8	0	8	0	0	0
BEST-FL.xlsx		Sep 25, 2019, 10:57:43 AM	HA Claim and B35 Files	Processed	5	4	0	0	0	5
BEST File v2.csv		Sep 24, 2019, 4:48:40 PM	HA Claim and B35 Files	Rejected	4	0	4	0	0	0
BEST File.csv		Sep 24, 2019, 4:46:27 PM	HA Claim and B35 Files	Rejected	4	0	4	0	0	0
BEST-EHT(0).xlsx		Sep 24, 2019, 10:51:24 AM	HA Claim and B35 Files	Processed	2	2	0	0	0	2
BEST-EHT(7).xlsx		Sep 23, 2019, 3:08:10 PM	HA Claim and B35 Files	Validated	9	0	1	0	8	0
BEST-EHT(6).xlsx		Sep 23, 2019, 12:16:46 PM	HA Claim and B35 Files	Processed	8	1	0	0	0	8
BEST-EHT(5).xlsx		Sep 23, 2019, 12:01:57 PM	HA Claim and B35 Files	Processed	8	8	0	0	0	8
BEST-EHT(4).xlsx		Sep 20, 2019, 10:26:02 AM	HA Claim and B35 Files	Processed	9	2	0	0	0	9
BEST-EHT(3).xlsx		Sep 20, 2019, 10:17:25 AM	HA Claim and B35 Files	Processed	8	8	0	0	0	8
BEST-EHT(2).xlsx		Sep 19, 2019, 2:25:19 PM	HA Claim and B35 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				
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.