

# Survey-Less Guidance Drives 2X Employee Engagement

CASE STUDY

**Client:** Research Company with Complex Benefit Needs

**Solution:** SelectSmart™

## The Challenge: Delivering Effective Benefit Guidance

Client wanted a scalable guidance solution that improved employee decision-making and reduced HR complexity created by legacy, time-consuming, survey-based approaches.

## The Approach: Survey-Less, Personalized Benefit Guidance

Client implemented SelectSmart, a survey-less, personalized guidance solution integrated into their Benefits Administration System, reinforced by **pre-enrollment benefit messaging**, employee **incentives**, and SelectSmart-focused **communications** integrated into client's open enrollment program.

## The Results: Increased Engagement and Value

SelectSmart delivered **40% employee engagement**, driving smarter decisions and measurable value.



SAVVI's financial guidance solutions help me provide benefits experiences not offered by other brokers. Their data driven insights and personalized solutions are a real game changer.

Account Executive,  
National Broker

**100%+**

increase utilization  
from prior year<sup>1</sup>

**79%**

of households completed  
the benefit open enrollment  
experience<sup>2</sup>

**50%+**

of users  
extended their engagement  
beyond enrollment, using  
NextDollar for ongoing savings  
and retirement guidance<sup>3</sup>

**58%**

of recommended  
employee bundles included at  
least one supplemental benefit,  
reflecting coverage gaps identified  
through personalized guidance<sup>2</sup>

## What Employees Value Most About SelectSmart<sup>4</sup>

Guidance that **simplifies complex benefit decisions**

Personalized recommendations  
**in minutes**

**Saves hours** of manual  
cost calculations

Benefits connected to **budget, savings, and retirement** goals

**Transparent, comprehensive**  
benefit comparisons

**Guidance that works. Decisions that pay off. Let's find the right solution for you.**

Visit [savvifi.com](https://savvifi.com) to learn more, or give us a call at **781-583-7011**.

### About SAVVI

SAVVI Financial provides expert, personalized guidance to help employees navigate their most important financial decisions, from choosing the right benefits to planning for retirement. Integrated with HR systems, SAVVI reduces admin work, cuts costs, and improves the employee experience. SAVVI was built with the understanding that the path to financial strength starts, and grows, through the workplace. Learn more at [www.savvifi.com](https://www.savvifi.com).

<sup>1</sup> 103% Growth YOY of client employees who started the SelectSmart guidance experience.

<sup>2</sup> 79% of employees who started the experience, reviewed assumptions and requested a bundle recommendation.

<sup>3</sup> 50% of employees started the SelectSmart experience, started NextDollar experience.

<sup>4</sup> Based on user interviews conducted with employees November 2025.