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How SurveyMonkey transformed open enrollment

Giving employees personalized benefits guidance at scale

SurveyMonkey is a survey and forms platform with approximately 1,000 employees across offices in the U.S., UK, Canada, Ireland, the Netherlands, Italy, India, and Costa Rica. The company serves millions of customers globally who use its platform for customer experience, employee engagement, and market research.

SurveyMonkey®

COMPANY SIZE
~1,000 Employees

INDUSTRY
SaaS

LOCATION
Global

20% utilization

369 hours saved

100% positive feedback

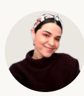
CHALLENGE

Scaling personalized guidance during open enrollment

SurveyMonkey's 2025 open enrollment reflected a common benefits consideration: how to deliver meaningful, personalized guidance to employees at scale.

OneDigital, their broker, recommended AI. But the benefits team wanted to ensure any new technology added clear value without increasing complexity. Rather than adding another interface, they looked for a solution that would empower employees. Avante stood out because it was purpose-built for benefits; by using the most up-to-date data, it transforms a fragmented support experience into a streamlined, one-stop comparison solution.

"Our support model was intentionally high-touch, and as we scaled, we saw opportunities to enhance speed and accessibility. **Our goal was to automate the routine and streamline the complex**—replacing manual ticket queues with a system that delivers immediate answers directly into employees' hands."



Camila Menendez Santos
Global Benefits Manager, SurveyMonkey

SOLUTION

Purpose-built benefits intelligence

SurveyMonkey deployed Carly, Avante's AI agent with instant access to SurveyMonkey's complete benefits documentation, plan details, and enrollment data. Available 24/7, Carly could answer basic questions like "What is critical illness insurance?" or run complex scenarios comparing multiple plans based on family situation and expected healthcare needs.

The deployment served two audiences: employees seeking benefits guidance and the HR operations handling escalations. While Carly remains available year-round, the initial focus was the high-stakes open enrollment period.

RESULTS

Benefits transformation during the two-weeks of open enrollment

(October 27 - November 7, 2025):

100%
positive feedback from in-app ratings

369
hours saved (Equivalent to 4 full-time employees)

20%
of eligible employees used Carly

26%
used complex scenario modeling

Impact on the benefits team

“Carly enabled me to quickly validate and share accurate responses with employees,” says Menendez Santos. “As a result, **I was able to dedicate more time to complex, high-impact cases.**”

The impact extended beyond the core benefits team. SurveyMonkey’s HR operations team used Carly to answer questions instead of escalating them. “When they received tickets related to open enrollment, they could just take those questions, put them in Carly, and use that as the answer,” notes Lauren Clark, Director of HR Business Partners & Total Rewards.

Impact on employees

“Carly helped create a more elevated and personalized benefits enrollment experience,” Clark says. “**Avante provided employees with a confidential space to understand and explore benefit options**. Ultimately this allowed them to make decisions that feel right for them and also reduced the need for individualized conversations with the Benefits team.”

21% of questions came after hours, revealing when employees make benefits decisions: at home, often with a spouse, while reviewing household budgets. With Carly available 24/7, these decisions didn’t have to wait for the next business day.

“What excites me most isn’t just the time savings. It’s the data, For the first time, we have deep insight into what employees actually want to learn and know about their benefits. Carly has enabled personalization, communication and education that have a material impact on our employees’ experience.”

Rebecca Cantieri
Chief People Officer

SurveyMonkey®

One finding surprised the team: over half of questions about hospital, family, critical illness, and accident insurance were purely definitional. Employees weren’t asking about specific plan details; they were asking, “What is this?”

“I was surprised by how many ‘what is this’ questions we got,” Menendez Santos reflects. “Typically the question is ‘Will this cover X?’ But seeing that folks didn’t have that foundational understanding was eye-opening.”

The data also pointed to strong interest in HSA optimization, cost-and-coverage considerations, and new benefit offerings. “As we shape our 2026 benefits education roadmap, this insight helps us prioritize the topics that matter most and tailor education to the right depth,” says Menendez Santos.