



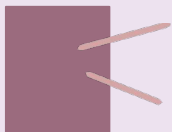
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Automated Enrollment
Campaigns



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ROI Maximization: The Enrollment Imperative



Data-driven personalization is the key to cost savings and bottom line impact.

Employees who work with their Cleo support team drive \$3,000 in annual savings.* You've invested in the benefit, but that cost savings is lost when employees don't enroll



How do you get the right employee to the right benefit at the right time?



Without utilization, where is the value in your investment?



Optimal savings requires clear communication and encouragement for employees to actually *enroll* and *use* the benefit, at initial rollout *and* on an ongoing basis.

*Amount saved per engaged employee.

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Use eligibility and
leave file data to
automate your way to

- ✓ increased
enrollment
- ✓ better outcomes
- ✓ lower costs
- ✓ higher ROI

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Your new support system is waiting



You're there for everyone: your child who needs more support at school, your partner as you go through fertility or health challenges together, your parent who is aging and facing changes in their health.

But who's there for you?

AcmeCo is proud to partner with Cleo. Cleo offers support to meet you where you're at and help with what you actually need.

[CLAIM YOUR BENEFIT](#)

Whether it's planning for a school transition, navigating complex care decisions for a loved one, or figuring out how to ask your manager for more flexibility — Cleo gives you a place to go, people to talk to, and plans that move you forward.

No matter where you are in your parenting, caregiving, or personal wellness journey, Cleo helps you manage the emotional and practical sides so you can be present, not just stretched thin.

Cleo is a support system for people just like you — and it's always FREE.

To claim your Cleo benefit, visit hicleo.com/activate or tap the download links below on your smartphone.



Cleo team takes on the full scope of communication

We manage the entire campaign, from strategy to send.

Once data file is in place, your team doesn't coordinate a thing.

Cleo takes care of everything.

The Financial Case for Automated Enrollment



Enrollment is the first critical step. Every unenrolled employee represents a potential high-cost claim.

Automated Enrollment Campaigns initiates the strategic shift from treating costly crises to proactive cost avoidance.

increased enrollment → lower claims →
reduced attrition → **lower costs**

Timing is Everything: Reach employees at optimal moments of eligibility and cost savings opportunities.



1. Leave



2. New Employee



3. The Family Cohort

Organizations partnering with Cleo to send direct enrollment emails to employees going on leave see an average of **44% conversion to enrollment**.

New Hires: Peak Benefits Awareness

New employees are actively reviewing benefits and need immediate support to ensure long-term retention and cost mitigation in advance.

53% of employees cited “greater work-life balance and better personal wellbeing” as a top priority when considering whether or not to take a job with a different organization.

Target Audience: New Employees

Data Point: New Hires (Enroll proactively for early engagement, and guide them to lower-cost, high-quality care.)



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Reducing Claims Risk: The Family Cohort

High-cost claims are heavily weighted toward maternal healthcare, pediatric care, and unexpected chronic diagnoses.

Replacing leaders costs 200% of their salaries, replacing employees in technical roles costs 80% of their salaries and replacing frontline employees costs 40% of their salaries (Gallup, 2024)

Target Cohort: New Employees + Dependents/Spouses.

Data Point: New Hires + Dependents on Health Plan (potentially) Enroll proactively to guide them to lower-cost, high-quality care.

Immediate Cost Mitigation: Leave

Leave can be a high-stress, high-cost event. Benefits enrollment here is critical for optimal support to mitigate costs from necessary leaves, and cost savings in prevented leaves of absence.

\$29,000 = Cost for one mid-level employee on an 8-week leave (with wages, backfill costs, and lost productivity)

\$4,400,000 = Total cost of leaves of absence for 1,000-life employer

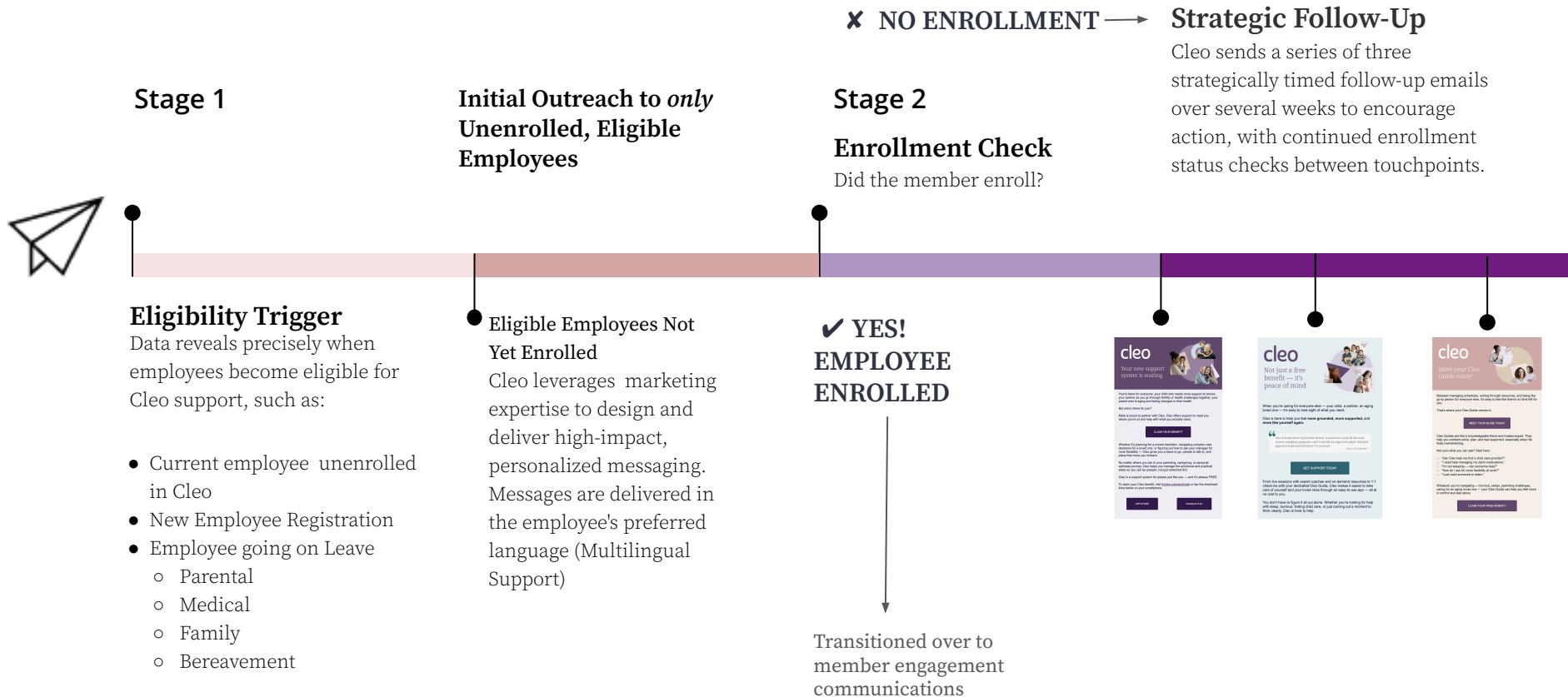
\$890,000 = Potential cost savings from avoiding preventable leaves of absence with Cleo's proactive support model

Target Cohort: Employees planning for or currently on leave

Data Points: State (US)



Enrollment at Scale

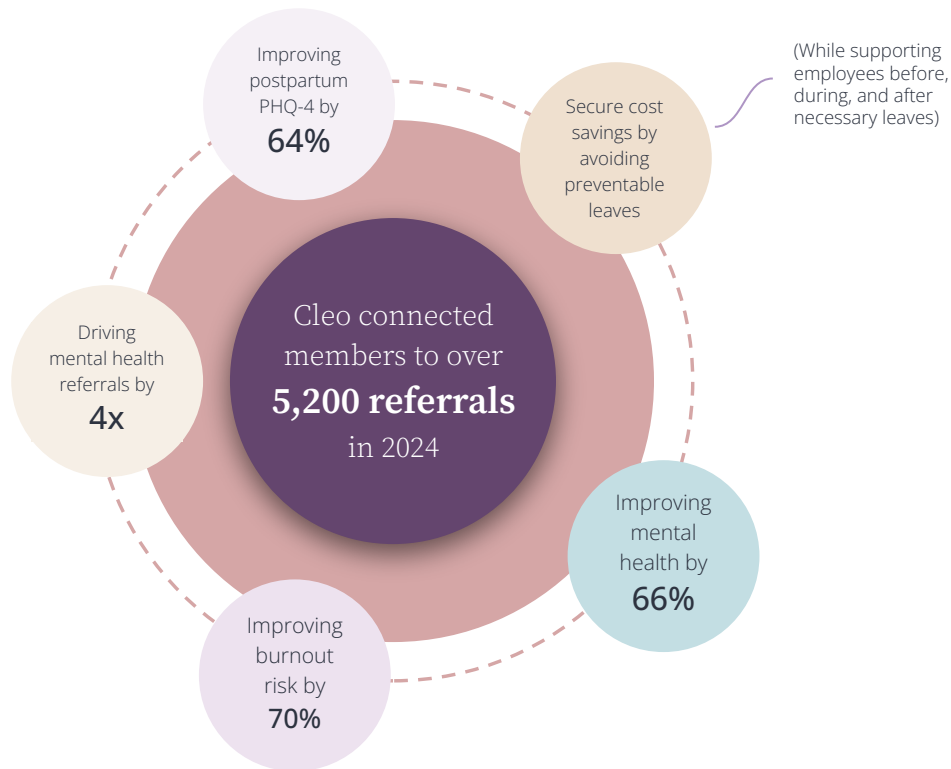


The Enrollment-to-Savings Loop



Boosting Your Entire Benefits Ecosystem ROI

Increased enrollment in Cleo is proven to enhance utilization of other existing benefits.



More employees enrolled and actively engaged in Cleo benefit results in cost savings by:

- ✓ Reducing absenteeism
- ✓ Enhancing productivity
- ✓ Improving mental health
- ✓ Increasing employee engagement
- ✓ Lowering healthcare claims
- ✓ Reducing turnover rates

Clients with more employees who are active Cleo members experience the benefits:

70%

Improved Mental Health
of members reporting an improvement in their mental health.⁷

64%

Improved Productivity
of members reporting time savings of 9+ hours, with 21% reporting saving 20+ hours.⁷

97%

Improved Retention
of parents who return to work after the birth of a child.⁷

\$5,079

average cost savings per
Pregnancy and Postpartum
members with PHQ-4
improvement.⁷

\$1,293

average cost savings for **Family**
Forming, Parents and
Caregiving members with
PHQ-4 improvements.⁷



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Next Steps: Getting Started with Automated Enrollment + Cost Avoidance

✓ Schedule call to confirm secure transfer of data

✓ Confirmation from Cleo of data receipt

✓ Campaigns automatically launch

✓ Review metrics at 6 months and continue iteration

We are excited to partner with you to amplify engagement of Cleo and further improve both your wellbeing and ROI.



Automated Campaign Launch Process:

Technical & Setup:

- ☐ Eligibility file: Active file on record confirmed
- ☐ IT Whitelisting (whitelist @hicleo.com domain)

Campaign Decisions:

- ☐ Campaign type: confirm standard campaign templates
- ☐ Target Audience (select one):
 - ☐ All Eligible Members (🏆 Best Practice)
 - ☐ New Hires Only (Effective date: __/__/__)
- ☐ Launch Date: Initial emails deploy on: __/__/__

Handoff

- ☐ Submission: Finalized details submitted to Cleo Lifecycle Marketing
- ☐ Review and optimize campaigns after full cycle completion

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thank you