

A photograph of a modern, multi-story office building with a white facade and large glass windows. The Colonial Life logo is visible on the upper part of the building. The image is partially obscured by a dark grey diagonal overlay and a yellow triangular overlay at the bottom.

Colonial Life

# CUSTOMER SUCCESS STORIES

DEPLOYING SMART TECHNOLOGY  
TO PROVIDE A MORE EFFICIENT  
ALLOCATION OF BENEFITS COUNSELORS

  
**Colonial Life**<sup>®</sup>

The benefits of good hard work.<sup>®</sup>

[coloniallife.com](http://coloniallife.com)

  
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[wonolo.com](http://wonolo.com)

For 75 years, Colonial Life & Accident Insurance Company, a subsidiary of Unum Group, has had one mission: to help America's workers preserve and protect the vitally important things they work so hard to build. Headquartered in Columbia, S.C., Colonial Life offers a wide range of financial protection benefits through the workplace, serving more than 3.5 million people in 85,000 companies. In addition to its personal insurance products and benefits counseling expertise, the company is an innovator of enrollment technology. Its end-to-end capabilities and commitment to excellence enable the company to provide unmatched customer service. With more than 10,000 sales representatives and more than 1,100 home office professionals, Colonial Life helps America's workers during life's most challenging times.

To ensure its customers can access the help they need when they need it most, Colonial Life recently began working with Wonolo to deploy on-demand benefits counselors to serve clients during its busiest times of year.



## THE CHALLENGE

For Colonial Life's clients, the overwhelming majority of their purchasing experiences take place in face-to-face sessions with benefits counselors who can demonstrate the value of the company's products. As millions of these transactions take place each year, the company requires clear visibility into its counselor availability. The demand is even greater during each fall season, when most employers have their annual enrollment periods.

Each Colonial Life field office has its own counselors. In the past, when one district had no counselors available but a nearby district did, the company was unable to seamlessly share this pool of resources. Compounding the matter was the inability to predict when and where counselors would be needed and having no efficient way to communicate between district offices.

"A steady supply of benefits counselors to provide immediate enrollment support to our fast-growing client base is essential for our growth," explained Colonial Life's Richard Shaffer, Vice President of Enrollment.



**Richard Shaffer**

Vice President of Enrollment,  
Colonial Life

“Not only were we able to serve customers in every enrollment opportunity, but our year-over-year sales increased by 25 percent that quarter in that territory.”

# WONOLO'S SOLUTION

Recognizing the need for greater visibility into the supply of talent to fill jobs more quickly, Colonial Life first implemented Wonolo's on-demand staffing software in 2015 in the West Coast market to see how the platform's on-demand talent solutions could help it fill those crucial gaps. By implementing Wonolo, Colonial Life was looking to address the challenge posed by scheduling benefits counselors for enrollments in all 50 states with numerous new and existing customers.

Through Wonolo, Colonial Life was able to access qualified counselors in a particular area who could be deployed at a moment's notice. As a result, the time-to-fill for customer enrollments went from days to hours. Moreover, travel expenses were reduced considerably.

Colonial Life also rolled out Wonolo in its South Florida market for its busy fourth quarter. This quarter is particularly critical to the business, as 40 percent of its revenue comes in during those few months.

"We ended up onboarding about 180 counselors to help out with our busy season," Shaffer said. "Not only were we able to serve customers in every enrollment opportunity, but our year-over-year sales increased by 25 percent that quarter in that territory."



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## COLONIAL LIFE AND WONOLO: THE BENEFITS AND WHAT'S NEXT

Having moved out of this initial pilot in the fall of 2015, Colonial Life has onboarded nearly 2,000 counselors, a significant percentage of its total number of agents in the field, well in advance of its 2016 fourth quarter busy season.

This newfound flexibility through Wonolo's technology is transforming the way the company conducts enrollments and how it motivates top benefits counselors. "We want to direct more work to our top performing benefits counselors," Shaffer said.

"How quickly we're able to fill jobs through Wonolo has been a pleasant surprise," he added. "More than that, our teams can devote more time to crucial pre-enrollment communications. Now we can enhance customer outcomes with even better benefits communications, which is another benefit from our use of Wonolo."

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### **Richard Shaffer**

Vice President of Enrollment,  
Colonial Life

For this established insurance company, the transformation for this part of its business has been important, as it looks to continue to innovate and drive growth through collaborative partnerships.

“Our company’s openness to change and curiosity has gone up since working with Wonolo,” Shaffer said.

With an increased pace of change inside of the company, a new energy around sharing available resources, and significant savings in time, Colonial Life is already reaping the many benefits of its technology partnership with Wonolo, all the while staying true to its roots of being an innovator in the industry.

## **ABOUT COLONIAL LIFE**

Colonial Life is a market leader in providing financial protection benefits through the workplace, including disability, life, accident, dental, cancer, critical illness and hospital confinement indemnity insurance. The company’s benefit services and education, innovative enrollment technology and personal service support more than 85,000 businesses and organizations, representing more than 3.5 million of America’s workers and their families. For more information visit [www.coloniallife.com](http://www.coloniallife.com) or connect with the company at [www.facebook.com/coloniallifebenefits](http://www.facebook.com/coloniallifebenefits), [www.twitter.com/coloniallife](http://www.twitter.com/coloniallife) and [www.linkedin.com/company/colonial-life](http://www.linkedin.com/company/colonial-life). Colonial Life is a registered trademark and marketing brand of Colonial Life & Accident Insurance Company.

## **ABOUT WONOLO**

Wonolo – which stands for Work. Now. Locally. – takes on-demand to a new level by helping companies manage their large, distributed workforce with our match and dispatch software that connects field teams with work opportunities in real time. From Wonolo’s SaaS platform, businesses can manage their own internal teams and schedule work all in one place. Headquartered in San Francisco, Wonolo has partnered with hundreds of leading companies, from startups to FORTUNE 500s, to provide a newfound flexibility in their workforce.

**Contact Us**

✉ [sales@wonolo.com](mailto:sales@wonolo.com)