

Unlocking AI to Transform Benefits Communications

How to use generative AI to accelerate your impact

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Goals for Our Session



Explore how AI is reshaping participant communications



Share real-world case studies



Provide tools and strategies for immediate application

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Do not edit
How to change the design



What's your experience using AI for benefits communications?

① The [Slido app](#) must be installed on every computer you're presenting from



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Why AI Matters in Benefits Communications



Challenges:

- Diverse participant populations
- Complex topics and content sprawl
- Limited resources



AI Opportunities:

- Efficient strategy, content development, and delivery
- Personalization at scale
- Automation of routine messages
- Real-time feedback and optimization



How AI Can Accelerate and Improve Your Work

- 1** **Strategy and segmentation:** Use AI to identify what to say, when to say it, and who needs to hear it—across all vendors and the entire employee experience.
- 2** **Content and creative:** Partner with AI to simplify complex topics and build targeted messages for diverse audiences.
- 3** **Delivery technology:** Tap into AI-enabled technology to share your content seamlessly, efficiently, and intuitively with target audiences.
- 4** **Measurement and optimization:** Use AI to gather and/or analyze data and feedback in real time, so you can refine messages and improve impact.

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How You Can Put AI Tools into Action Now

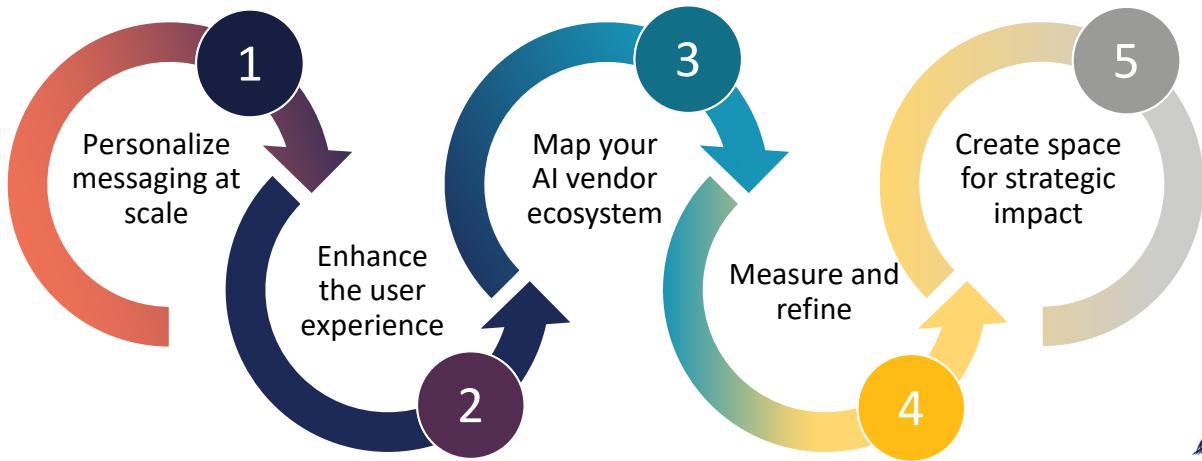
Your Communications Need	How to Get Going with AI
Strategy and segmentation	Partner with AI-forward comms strategists skilled in using tools like Copilot, ChatGPT, Claude, etc.; explore and experiment (safely).
Content and creative	Collab with AI-savvy creatives using tools like Copilot, ChatGPT, WRITER, Adobe, Midjourney, etc.
Delivery technology	Build AI-powered tech internally, buy from vendors, or embed into existing platforms. Ex: Granicus, Salesforce, Remesh, Segal Benz AI Assistant
Measurement and optimization	Use AI-powered analytics tools and feedback loops to refine and optimize. Ex: Remesh, Google Cloud AI, Salesforce dashboards

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Five Best Practices for AI-Forward Communications



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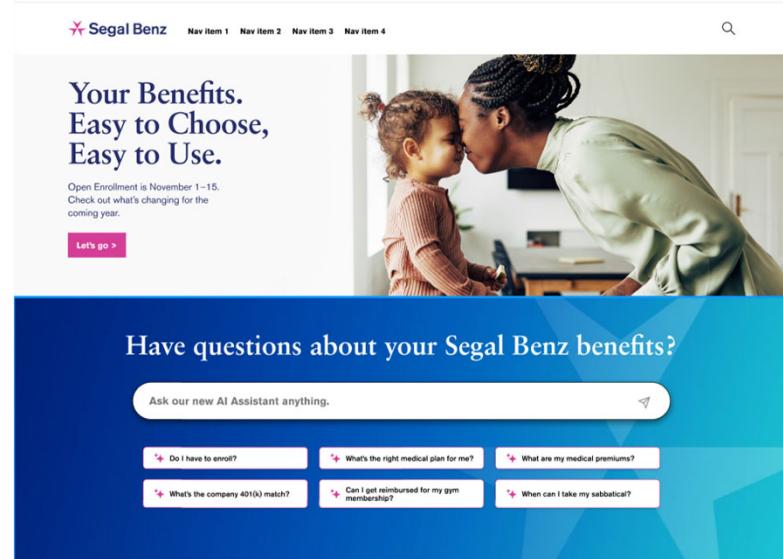
CASE STUDY 1 AI Assistant for Benefits

Client: Segal Benz (other SB clients implementing this fall)

Solution: AI assistant on microsite

Impact:

- 24/7 support
- Reduced HR tickets
- Improved participant confidence
- Screenshot of assistant interface
- Metrics dashboard



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CASE STUDY 2

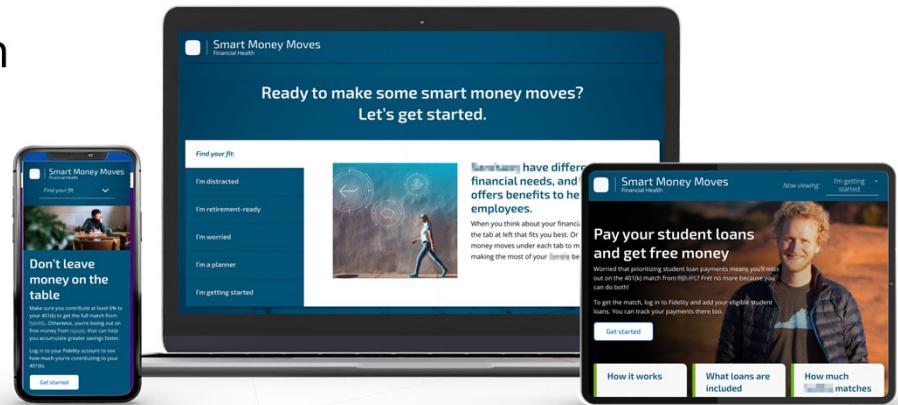
Retirement Personalization

Client: Segal Benz client (anonymized)

Solution: Segmented messaging and generative content

Impact:

- Higher engagement
- Better plan selection
- Streamlined operations



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PROMPT:

What's one communication challenge AI could help solve in your plan?

INSTRUCTIONS:

- Break into small groups
- Discuss and identify one AI tool or strategy
- Prepare to share

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GROUP SHARE AND WRAP-UPS: Buzz Group Themes

KEY TAKEAWAYS:

- AI is accessible and actionable.
- Start small, scale smart.
- Focus on participant needs.

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TAKEAWAY: Your AI-Forward Communications Toolkit

WHAT'S INCLUDED:

- AI readiness assessment
- “Which AI tools to use when” guide
- Starter AI prompt library
- AI quality-assurance checklist

Find it in the
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conference
app!

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Thank you!



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