

Unlocking AI to Transform Benefits Communications

How to use generative AI to accelerate your impact

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1

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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2

3

4

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

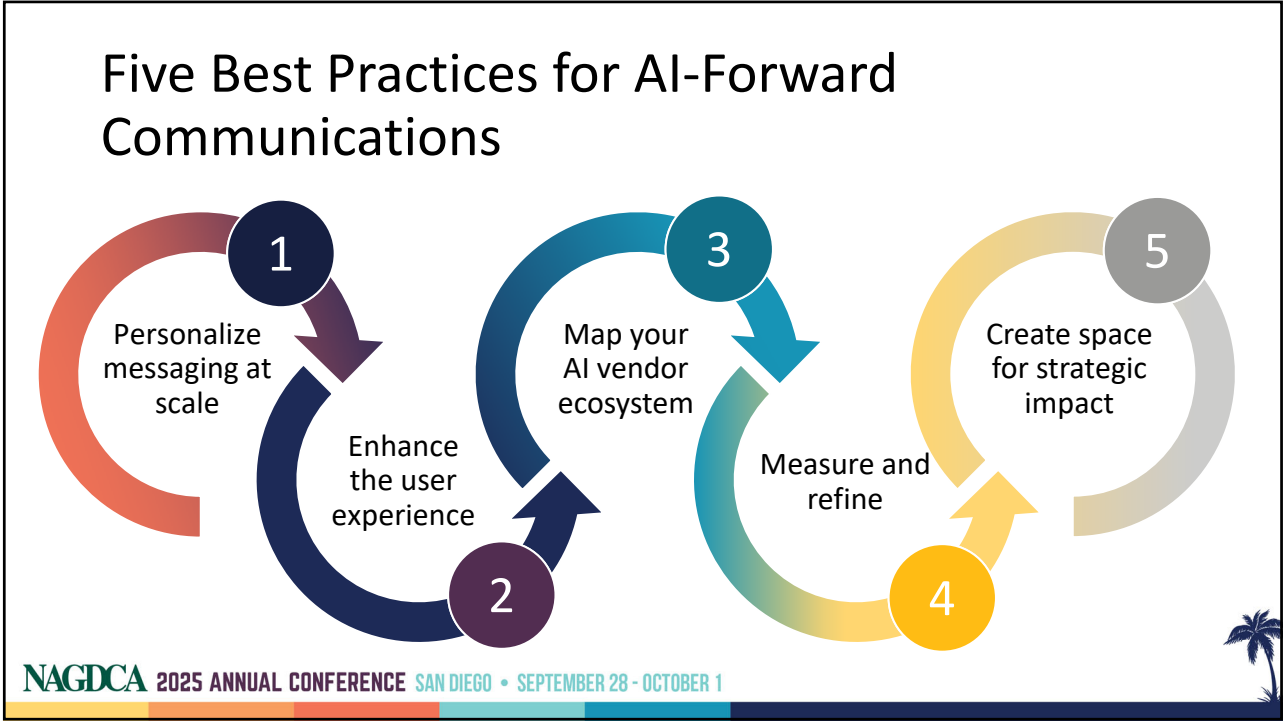
Measurement and optimization: Use AI to gather and/or analyze data and feedback in real time, so you can refine messages and improve impact.



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





7

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

Segal Benz

Nav Item 1 Nav Item 2 Nav Item 3 Nav Item 4

Your Benefits. Easy to Choose, Easy to Use.

Open Enrollment is November 1-15. Check out what's changing for the coming year.

Let's go >

Have questions about your Segal Benz benefits?

Ask our new AI Assistant anything.

Do I have to enroll? What's the right medical plan for me? What are my medical premiums? What's the company 401(k) match? Can I get reimbursed for my gym membership? When can I take my sabbatical?

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8

CASE STUDY 2

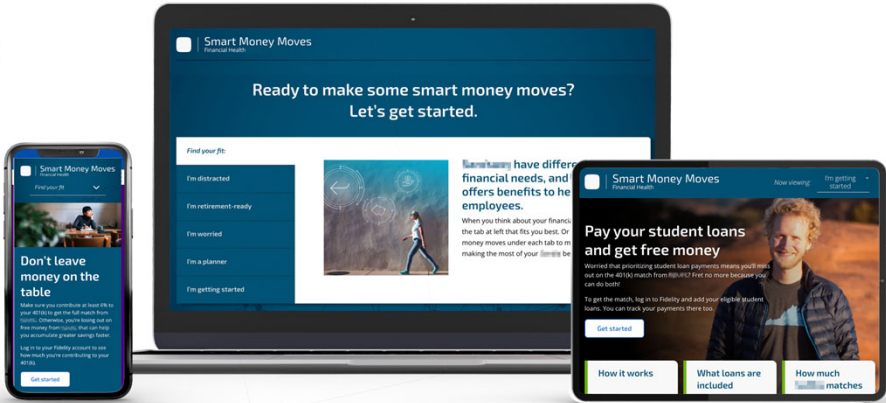
Retirement Personalization

Client: Segal Benz client (anonymized)

Solution: Segmented messaging and generative content


Impact:

- Higher engagement
- Better plan selection
- Streamlined operations



The image shows three devices displaying the 'Smart Money Moves' app. The laptop screen shows a 'Ready to make some smart money moves? Let's get started.' prompt with a list of options: 'I'm distracted', 'I'm retirement-ready', 'I'm worried', 'I'm a planner', and 'I'm getting started'. The tablet shows a 'Pay your student loans and get free money' offer. The smartphone shows a 'Don't leave money on the table' message. All screens feature a blue header with the app name and a 'Find your fit' button.

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9



Buzz Group Activity

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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10



Buzz Group Activity

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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11



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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12

