

Transforming Health Education Into a Personalized Engagement Engine

How a National TPA Built Member Trust and a Path to Trigger-Based Engagement

CUSTOMER SNAPSHOT

Organization: National Third-Party Administrator (division of a major national carrier)

Members Served: 8.6+ million

Client Base: National and regional employers

Public entities and state systems

School districts

Multi-state and fully customized benefit groups

Business Model: Highly configurable benefits administration with strong employer branding and customization requirements.

The Challenge

Like many large payers and TPAs, the organization faced a familiar set of challenges:

- Member engagement with health benefits remained difficult.
- Education tools existed but required members to proactively seek them out.
- Employers expected more personalized, branded digital experiences.
- Internal advocates needed a consistent, trusted content source.
- Leadership sought ways to influence smarter care decisions — without increasing friction.

At the same time, member expectations were evolving.

In a world where Amazon anticipates your next purchase and streaming platforms personalize content instantly, members increasingly expect healthcare experiences to be intelligent and contextual.

The organization recognized: **Simply offering a health education library was no longer enough.**

Education needed to meet members at the moment of need. >>>



It's table stakes — we've got to have that kind of tool as part of our digital experience."

— TPA Leadership

The Solution

The TPA implemented SmartEngage, a comprehensive clinically reviewed health education library integrated directly into its member portal. The goal was to provide:

- Trusted, evidence-based health information
- A consistent reference source for both members and internal teams
- A foundation for future personalized engagement strategies

How It's Used Today

1

Claims-Informed Member Outreach

Members receive “Things To Do” notifications based on historical claims data.

Letters and digital prompts guide members to the health education library to learn more about their conditions or care pathways.

While links are not condition-specific due to privacy requirements, members are directed to a trusted education environment within their plan ecosystem.

2

Advocate & Clinical Team Enablement

The TPA's advocate and clinical teams rely on the same education library during:

- Coaching conversations
- Care navigation discussions
- Member follow-ups

This creates alignment and consistency — reducing conflicting information and reinforcing trust.

3

Portal-Based Awareness Campaigns

To increase visibility and engagement, the organization:

- Elevated the library's placement within the portal
- Implemented monthly awareness banners (e.g., Breast Cancer Awareness Month)
- Integrated education access into digital member workflows

The focus shifted from buried resource to visible, everyday touchpoint.

The Impact

Strengthened Member Trust

Without a trusted education resource embedded in the benefits experience, members would be forced to rely solely on unvetted internet searches.

Leadership identified this as a significant risk to:

- Credibility
- Member confidence
- Perceived value of the TPA's offering

The library reinforces the message: “Your health plan is a trusted partner in your care journey.” >>>

Enhanced Employer Value Proposition

Employer groups expect robust digital tools as part of their benefits strategy.

Providing a comprehensive health education experience:

- Strengthens broker conversations
- Supports employer retention
- Reinforces differentiation in competitive bids

Improved Clinical Consistency

By aligning member-facing content with advocate and clinical workflows, the payer ensures:

- Consistent messaging
- Reduced misinformation
- Structured, evidence-based guidance

The Next Evolution: Trigger-Based Personalization

While the current implementation delivers strong foundational value, the organization is now exploring the next phase of engagement.

Their vision: **From Static Library → To Intelligent, Trigger-Based Engagement Engine**

Here's what that might look like:

Member searches for a knee surgeon	→	Knee condition education triggered.
Member reviews a specialty infusion claim	→	Condition and treatment guidance surfaced.
Cardiac event appears in claims history	→	Heart health resources automatically suggested.
MRI claim posts	→	"What Happens Next?" education provided.

The goal is to leverage:

- Claims data
- Event logic
- Search behavior
- AI-enabled personalization

To deliver education precisely when it is most relevant. >>>



As one leader noted:

We want to get smarter about getting members into the tool set at the right moment."

Why This Matters for Other Payers

This case illustrates an important shift happening across the industry: Education is no longer just content access. It is a strategic engagement lever.

Forward-thinking payers are asking:

- How do we influence site-of-care decisions earlier?
- How do we build trust in a digital-first environment?
- How do we personalize without overcomplicating?
- How do we demonstrate employer-facing value?

A well-integrated health education strategy helps answer all of these.

KEY TAKEAWAYS FOR PAYERS & TPAS

- ✓ Education strengthens trust and credibility
- ✓ Employers expect visible, integrated digital tools
- ✓ Advocate and clinical teams benefit from aligned content
- ✓ Trigger-based engagement is the next competitive differentiator
- ✓ AI-driven personalization is an emerging expectation

The Strategic Opportunity

For payers seeking to modernize their digital engagement strategy, the opportunity is clear: Move beyond offering a content library. Build an education experience that:

- Integrates with claims data
- Surfaces information at the right time
- Supports advocates and clinicians
- Reinforces employer value
- Strengthens member trust

Ready to Explore What This Could Look Like in Your Organization?

Let's discuss how personalized, trigger-based health education can elevate your member experience and strengthen your payer value proposition.