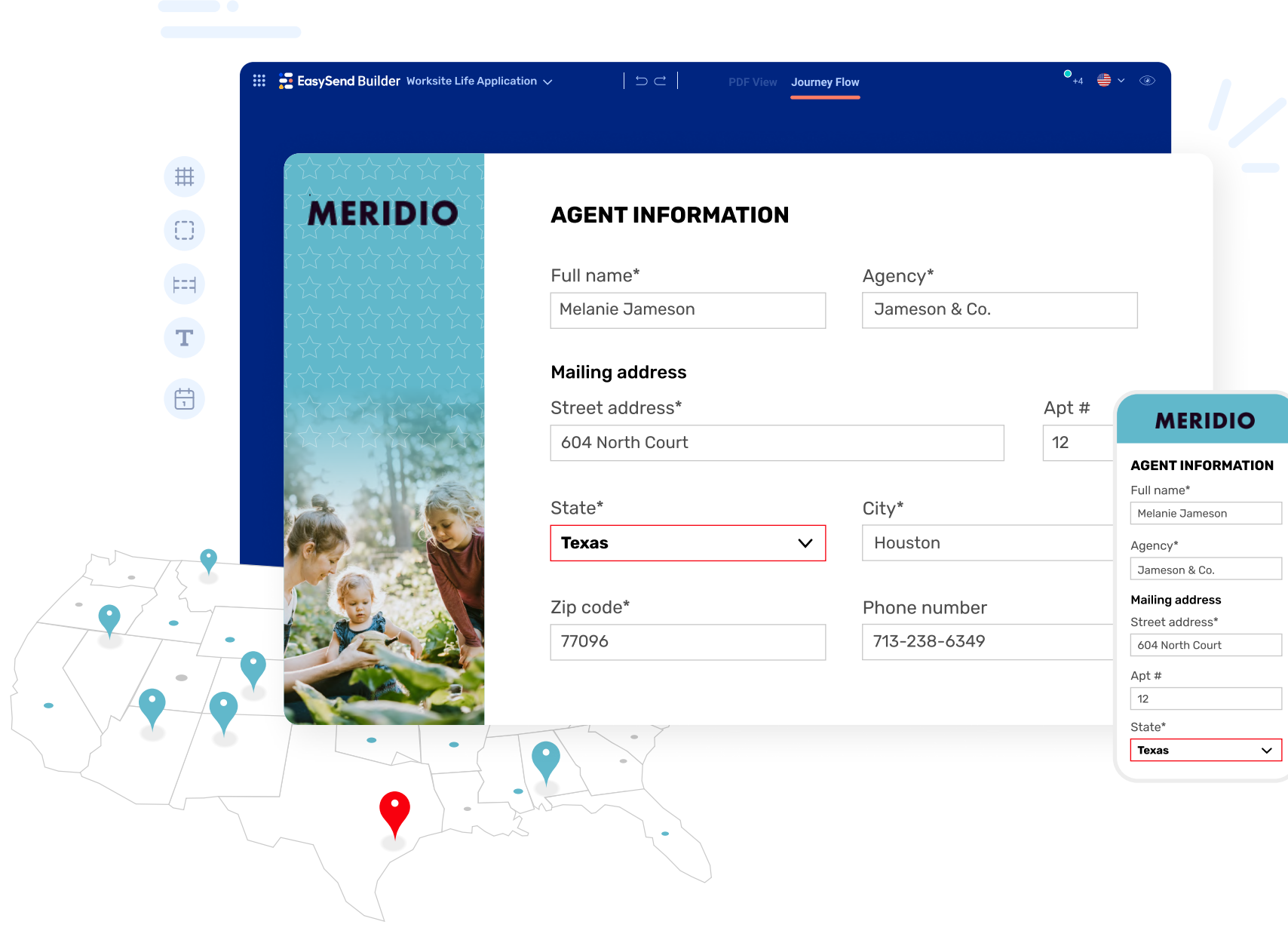


Meridio

Supporting 50 states with one dynamic journey

Meridio needed a smarter way to onboard insurance customers across 50 states. With sixty-six manual processes to comply with different state regulations, scalability was nowhere in sight. With EasySend, Meridio built one smart digital journey that adjusts automatically for each state so agents can easily onboard customers across America.



✓ Removed setup and installation time

✓ Reduced manual labor and human resources

✓ Onboarded customers across America faster

✓ Eliminated paperwork to scale easier



“The team support Cincinnati Life across multiple states. Since we've removed a number of setup steps, agents move confidently through one common process.”

Tom Grace
CIO

Helping customers make smarter decisions

Meridio makes it easier for companies to offer comprehensive benefits to their employees. By partnering with leading carriers like our client Cincinnati Insurance, Meridio offers supplemental benefit programs for full or part-time workers, including Accident Insurance, Critical Illness, Hospital Indemnity, Disability, and Life. A process made much easier by transforming their manual onboarding process into one smart digital journey with EasySend.

■ Industry
Insurance

● Geo
US

■ Digital journey
Onboarding
Worksite Life Application
Internal Process for Agents

✳ Feature highlight

Voice signature
Journey Sender
Business Logic
Conditions

The mission: Onboard customers dynamically

Looking for ways to support their carrier client, Cincinnati Insurance, Meridio wanted a better way to help their agents onboard new clients across multiple states. Traditionally, Meridio relied on complex PDFs that required a lot of manual work on the agent and customer sides and would differ depending on the state. This meant agents needed to know each state's guidelines to help customers choose their benefits. Working like this just wasn't scalable and Meridio needed to shift fast.

The solution: Create one smart digital journey

With EasySend, Meridio transformed sixty-six PDFs into one dynamic digital journey. Now, agents enter which state the customer is in to see the information needed and which insurance benefits are covered. In addition, the regulatory forms associated with each state are automatically selected and filled in preventing errors. Since this digital journey is purely agent-facing, it creates a bridge between their previous workflow and a fully digital experience. Exactly what Meridio is ready for right now.

Getting ready to scale in the future

Transforming the customer experience

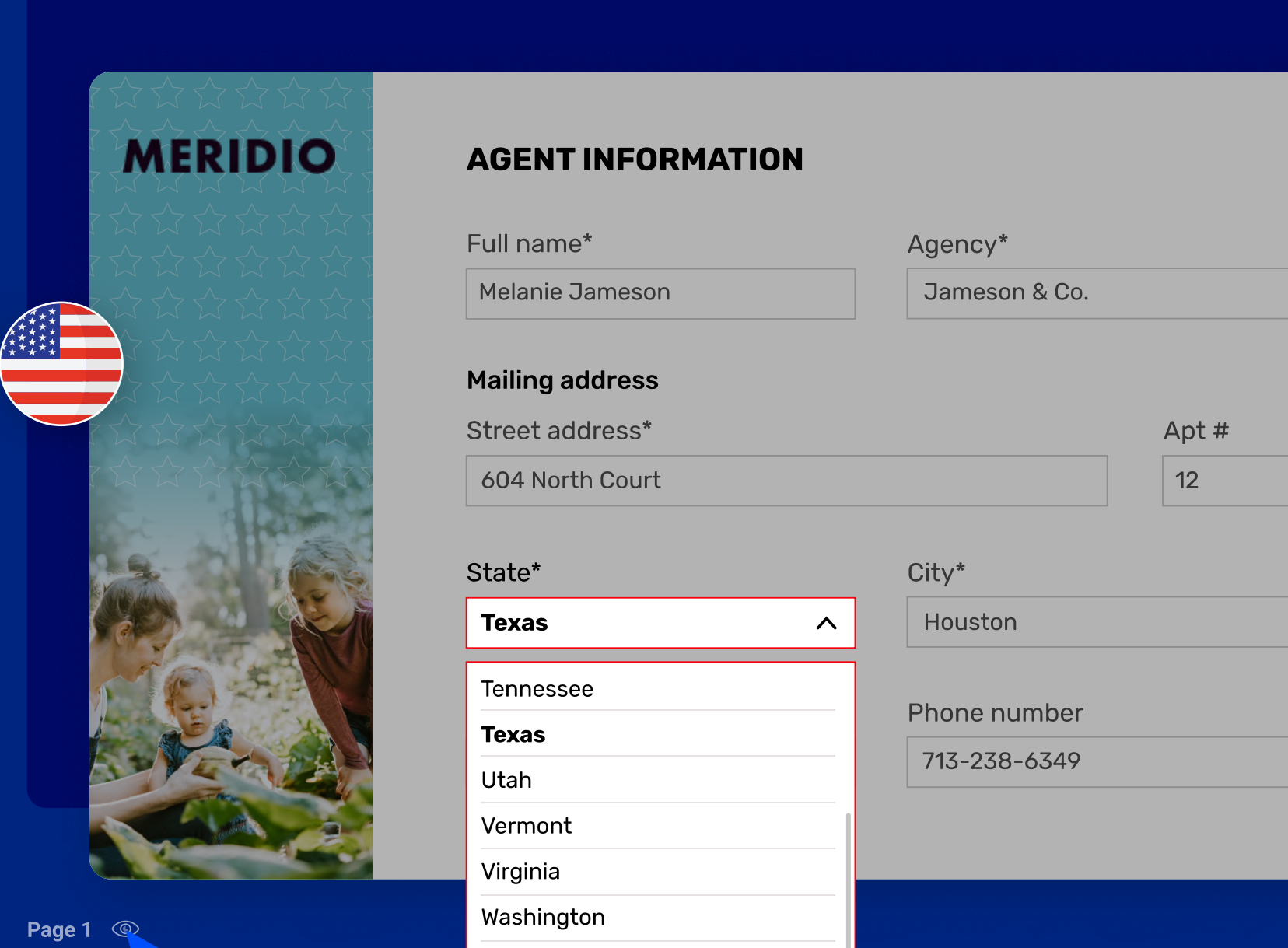
Converting sixty-six PDFs into one dynamic digital journey allowed Meridio's agents to confidently serve customers across America. Goodbye complexity, hello simplicity!

Becoming dynamic with no-code

Adding dynamic fields that coordinated with each state's regulations allowed the right fields, questions, and forms to appear determining which funnel the customers can go down.

Going digital one step at a time

Eliminating Meridio's complex paperwork while keeping the process agent-facing, allowed them to go digital as much as they're comfortable, without making too many changes at once.



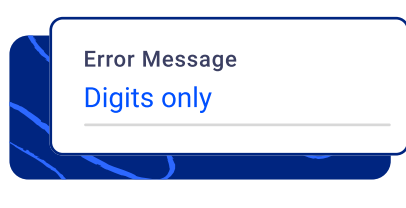
The power of EasySend at Meridio

Building • Customizing • Supporting



No-code Builder

Meridio used our no-code builder to turn sixty-six PDF packages into one dynamic digital onboarding journey.



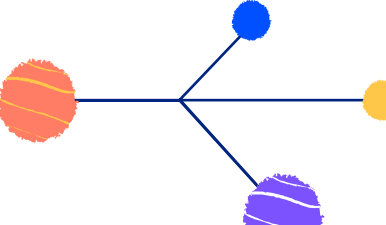
Logic & Conditions

By adding business logic conditions that applied to each state, Meridio created a dynamic flow that adjusted accordingly.



Custom Themes

Each digital journey Meridio makes will start with a custom theme made to match their brand's look and feel.



Smart workflows

Having a dynamic workflow built-in means Meridio's agents no longer need to memorize each state's guidelines, reducing stress and time.



Journey Sender

Meridio can send a pre-filled form to agents or a new link without wasting time searching through old processes.



Brand loyalty

By drastically reducing onboarding time, Meridio helps customers faster and agents feel more confident knowing they only need one journey to support everyone.

Supporting your digital transformation



“Working with the EasySend team was terrific and very well organized. If any challenges arose, they were direct and transparent. It was great to get the builder to account for all state differences and then iron everything out for launch.”

Tom Grace
CIO

Digital journeys, ready when you are

Cut out manual tasks and thrive remotely. Our experienced team has created over 2000 digital customer journeys in the insurance, banking, and financial enterprise industries.

About EasySend

EasySend helps enterprises go digital at a fraction of the cost and time. With our no-code platform, transform any insurance, banking, or financial manual process into a digital customer journey in days. Learn more at easysend.io.



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