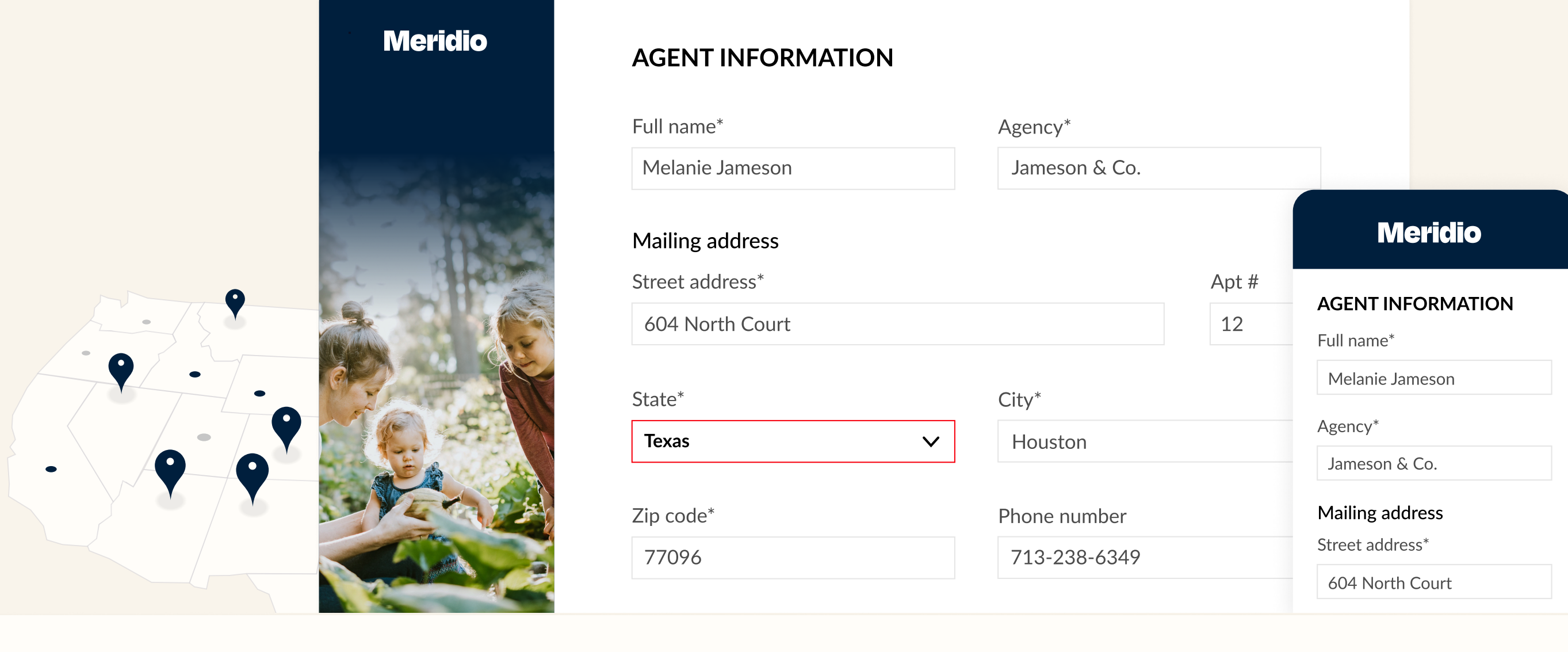


Customer story • Meridio

Supporting 50 states with one dynamic experience

Meridio transformed 66 state-specific forms into a single, smart journey, onboarding insurance customers across America with ease.



Meridio

Meridio needed a smarter way to onboard insurance customers across 50 states. With 66 forms to comply with different state regulations, scalability was nowhere in sight. EasySend helped Meridio build one smart digital journey that adjusts automatically for each state so agents can easily onboard customers across America.



Removed
setup and installation time



Streamlined
customer data intake



Onboarded
customers across America faster



Eliminated
forms to scale easier



Tom Grace
COO at Meridio

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

About

Meridio

Meridio offers small businesses and their teams access to affordable health benefits without the headache of implementing a traditional benefits program.

Industry

Insurance

Employing

30+

Digital journeys

- Onboarding
- Worksite Life Application
- Internal Process for Agents

Mission

Onboard customers dynamically

Looking for ways to support their carrier client, Cincinnati Insurance, Meridio sought a more effective way to help their agents onboard new clients across multiple states.

Traditionally, Meridio relied on complex PDFs that required significant effort on both the agent and customer sides, and these differed depending on the state. Agents needed to know each state’s guidelines to help customers choose the benefits that were right for them. It just wasn’t scalable, and Meridio needed to shift fast.

Solution

Create one smart digital journey

With EasySend, Meridio transformed 66 PDFs into a single dynamic journey. Now, agents enter the customer’s state to see which insurance benefits are covered. Additionally, the regulatory forms associated with each state are automatically selected and completed to prevent errors. Since this digital process is purely agent-facing, it bridges their previous workflow with a fully digital experience.

Getting ready to scale

Transforming the customer experience

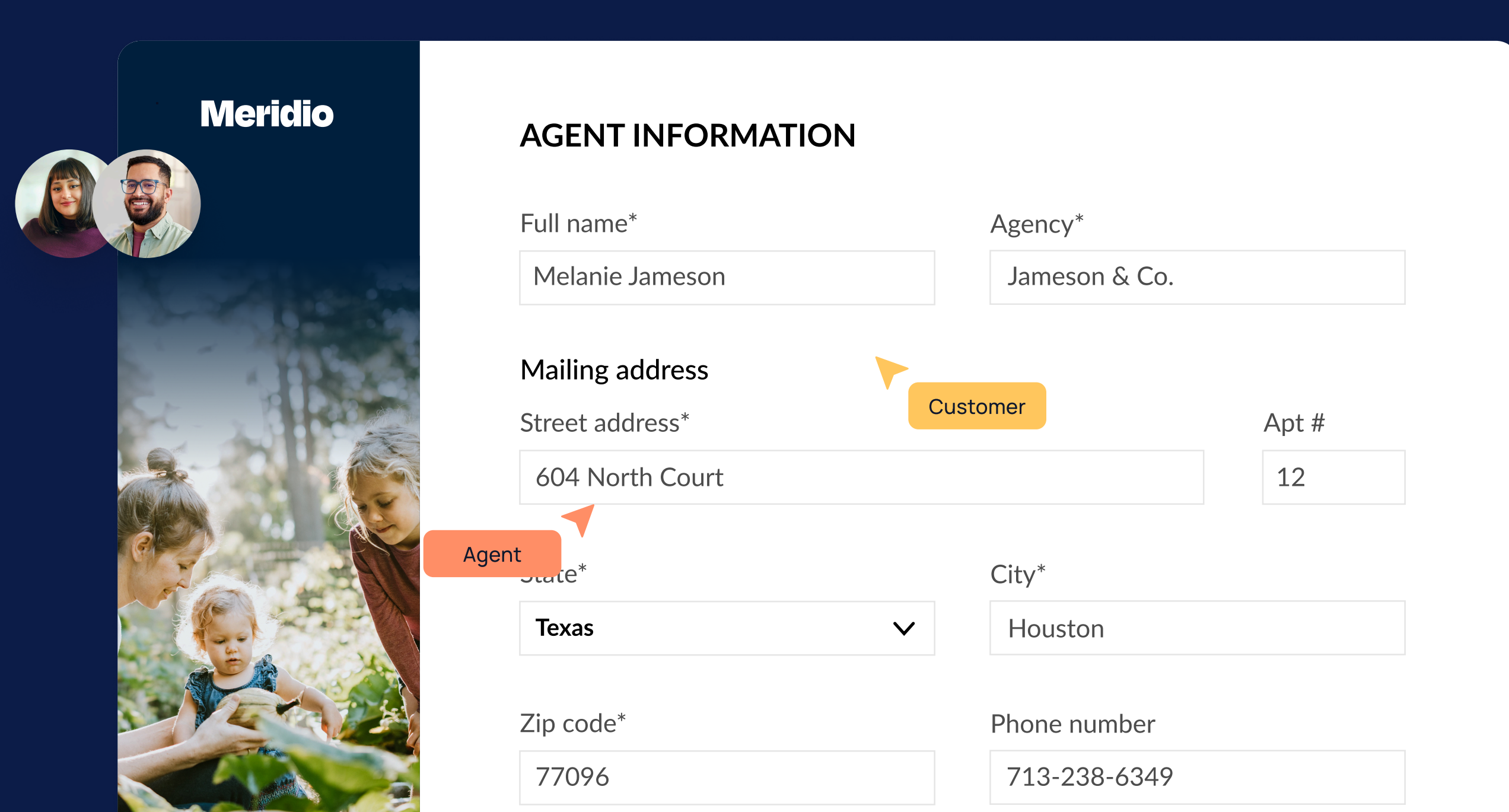
Converting 66 PDFs into a single dynamic digital journey enabled Meridio’s agents to confidently serve customers across America.

Going digital one step at a time

Eliminating Meridio’s complex forms while keeping the process agent-facing allowed digital transformation without making too many changes at once.

Becoming dynamic with low-code

Adding dynamic fields that are coordinated with each state’s regulations enables the right fields, questions, and forms to appear, thereby creating the optimal customer journey.



The power of EasySend at Meridio



No-code builder

Meridio used our no-code builder to turn 66 PDF packages into one dynamic digital onboarding journey.



Logic & Conditions

Adding logic and conditions for each state allowed Meridio to create a dynamically adjusting flow.



Custom themes

Each digital journey Meridio makes will start with a custom theme to match the brand’s look and feel.



Smart workflows

Having a dynamic workflow 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, eliminating the need to search through old processes.



Brand loyalty

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



Tom Grace
COO at Meridio

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.”

About EasySend

EasySend is the missing layer to limitless self-service.

Our AI-powered digital platform makes it easy to plan, create, and manage personalized customer interactions across every channel, seamlessly connected to your business software. With our low-code suite of products — Journeys, DynamicDoc, EasySign, and Workflow Manager — you go beyond traditional forms to deliver thoughtful, dynamic, and efficient experiences that go far beyond traditional forms.

[Learn more](#)