



GLIA IS A STRATEGIC PARTNER FOR BENEFIT HARBOR

A CASE STUDY with GTS National Channel Manager, Jamie Boedeker



Benefit Harbor is a technology & services company specializing in benefits administration, headquartered in Plano, TX. They manage five distinct campaigns (e.g., Aetna, Anthem, AFLAC) and serve over 98 enterprise clients.

BACKGROUND:

Benefit Harbor was dissatisfied with their current CCaaS (Five9) and UCaaS (Nextiva) providers so they engaged STC Technologies to help them evaluate alternatives. They were facing challenges with a lack of vendor support, an unintuitive admin interface, severe reporting limitations (data older than 60 days is inaccessible), and purely reactive, voice-only customer engagement.

OBJECTIVE:

The primary objective is to modernize their contact center to deliver a “white-glove experience” for their clients’ employees and improve operational efficiency for their 25-agent contact center (which scales to 40 in Q4) and 100 UCaaS users. Through discovery, the project has expanded to include a full-scale operational transformation, focusing on:

**AI-DRIVEN
ANALYTICS**

**WORKFORCE
MANAGEMENT**

**MULTI-CHANNEL
CUSTOMER
ENGAGEMENT**

**LONG-TERM
DATA
RETENTION**

BENEFIT HARBOR IS MOVING AWAY FROM THEIR DISJOINTED SOLUTIONS & LOOKING FOR A TRUE STRATEGIC PARTNER. THEIR GOAL IS TO CONSOLIDATE ONTO A MODERN, UNIFIED PLATFORM.

KEY REQUIREMENTS FOR THE NEW PLATFORM INCLUDE:

AI & AUTOMATION:

They have significant interest in AI to automate their currently manual QA and agent scoring processes (replacing Excel spreadsheets) and to provide accurate forecasting for their seasonal staffing spikes.

DIGITAL CHANNELS:

A core objective is the introduction of Chat and SMS to move beyond their current voice-only interactions and better manage inbound requests.

REPORTING & DATA:

Robust, long-term reporting is critical. They need the ability to retain all call recordings for 7+ years and require detailed analytics on queue callbacks, which is a major failure of their current system.

GLIA'S STRENGTHS

- ✓ **Strong Partnership Model**
- ✓ **Channel-less Architecture (seamlessly adding chat/SMS)**
- ✓ **Powerful AI-driven Quality and Forecast Analyst tools**

WHY THEY CHOSE GLIA:

Benefit Harbor also looked at Zoom, Dialpad, and TalkDesk, but eventually settled on Glia because of all they can offer to move their business forward. The intuitive admin interface, unlimited recording storage, and all-inclusive pricing model were key differentiators that addressed major pain points around administrative complexity and seasonal scaling.

