

IMPLEMENTATION CHECKLIST

Start Strong with a New Health Benefits Experience

Rolling out a new health benefits experience is more than a project—it is the start of a new promise to your people.

The right partner makes rolling out a new health solution seamless—building trust, driving engagement, and setting the stage for lasting impact. Use this checklist to launch with confidence.

Building a Strong Implementation Process

A best-in-class implementation will:



1. Define the Scope

Align stakeholders on goals and what success looks like.



2. Set SMART Goals

Establish clear, measurable, and time-bound objectives.



3. Engage Cross-Functional Stakeholders

Include teams from data, marketing, finance, and Member experience.



4. Clarify Roles & Responsibilities

Make ownership and expectations crystal clear.



5. Communicate Transparently

Prioritize regular check-ins and open channels.



6. Build a Phased Plan

Outline milestones, timelines, and risk management.



7. Allocate the Right Resources

Ensure both sides are set up to deliver.



8. Prioritize Quality Assurance

Test thoroughly before launch.



9. Stay Nimble

Adjust quickly when the unexpected happens.



10. Learn and Apply

Use launch lessons to strengthen future rollouts.

Seek One Place, One Contract, One Timeline

Using one platform for all your health benefits simplifies everything. With less technical details to manage, you can focus on providing benefits that support and care for your team - leading to better outcomes.

Multiple Point Solutions

- ✗ Multiple vendors, multiple handoffs
- ✗ Fragmented messaging
- ✗ Duplicative, error-prone workflows
- ✗ Siloed tools and systems
- ✗ Redundant QBRs and ABRs
- ✗ Confusing points of contact

The One Place for Health and Care

- ✓ One contract, one team, one timeline
- ✓ Coordinated integrated marketing & communications
- ✓ Single eligibility + billing setup
- ✓ Native integrations & shared data
- ✓ One review cadence
- ✓ Clear support and escalation



Ready to be a health and care changemaker?

Learn more at
transcarent.com/leadtheway