



Case Study | Regions Bank

From Daily Engagement to Hard-Dollar Savings

Overview

Regions Bank

Headquarters: Birmingham, AL

Size: 20,000 Associates

Partner Since 2024

Impact

70%

Activation rate

30%

Daily active users

85

Net Promoter Score

Key Takeaways

Abandon “Set it and Forget it”

Invest in Precision Analytics for N=1 Support

Prioritize Trust and Human Connection to

Engage the “Classic Unengagables”

Convert benefits awareness

Into Targeted Steerage for Maximum Impact

The Challenge

Their employee benefits strategy was not failing on design— but stalled engagement. Their health benefits were “one-and-done” ghosts: expensive programs that lived in a portal with sporadic use but were not consistently changing behavior enough to impact the cost curve.

- **Persistent Engagement Gaps:** Struggling to penetrate beyond a 40% plateau, leaving high-risk and under-served groups disconnected from care.
- **Ineffective Benefit Steerage:** Lack of member awareness leading to poor utilization of the right benefits at the right time.
- **Insights Latency:** The inability to translate data-driven insights into real-time operational action, resulting in missed opportunities for intervention.

The Solution

1) Daily Engagement & Sustained Trust

To meaningfully engage historically hard-to-reach populations, Regions moved beyond generic outreach and leveraged precision analytics to understand employees at an individual level. This allowed the team to identify specific barriers—such as access to care, health literacy, or social context—and pair personalized recommendations with trusted human support.

2) Awareness & Smart Benefit Steerage

Precision analytics replaced broad, generic promotion with personalized benefit matching, connecting employees to the programs most relevant to their needs. This shift eliminated confusion and dramatically improved utilization—ensuring investments in benefits translated into real employee impact.

3) Accelerating Population Health Outcomes

Regions shifted from broad population outreach to precision interventions by using targeted questionnaires to uncover specific health and social barriers. High engagement enabled the organization to move from insight to action in weeks—not months.