

ease



employee
NAVIGATOR

CASE STUDY

**From Ease to Employee Navigator:
95 Groups. 5 Weeks. Why Benefits
Lab Made the Switch.**



employee
NAVIGATOR

At a Glance

Since 2014	35-350	95	5 Weeks
Prior Ease user	Client size range	Groups migrated	Migration window

Benefits Lab is an employee benefits agency serving clients across the U.S., with a deep book of business spanning real estate, construction, agriculture, medical offices, home healthcare, law offices, schools, nonprofits, consulting services, and insurance agencies. After over a decade on Ease, Benefits Lab moved their entire book of 95 groups to Employee Navigator in five weeks. If you're still on Ease, this is worth reading.

The Challenge: Leaving a Platform They Knew

Benefits Lab had been on Ease since 2014, long enough that they could walk clients through the system blindfolded. For an agency that prides itself on taking the full administrative burden off clients, their benefits administration platform was central to their service delivery. So, when it was announced that Ease would sunset in 2027, the decision to migrate wasn't purely technical.

Leaving that level of familiarity wasn't something they took lightly. Once their initial roadblock, feature parity, was out of the way and they began migrating in earnest, their perspective changed. On Ease, they had a decade of muscle memory. Employee Navigator asked them to think bigger. Andrea now describes Employee Navigator with a consistent analogy: "Employee Navigator is like a Ferrari. If you decide to drive it to the gas station, that's fine — that's just benefits administration. But if you want to customize it so you can take it to the track, you can do that too. We didn't have that ability in Ease."



Time to go, you are only delaying the inevitable.



Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab



The Migration: Methodical, Manageable, and Faster Than Expected

Benefits Lab migrated 95 groups in five weeks without losing a single client, but they didn't approach the migration as a single lift. They built a structured process by dividing groups among team members, assigning dedicated migration weeks, and prioritizing clients with payroll connections to avoid disrupting payroll data syncs mid-cycle.

Migration at Scale

Smaller groups took as little as 2 hours from start to finish. Larger groups with carrier and payroll connections took roughly a day, including thorough cross-checking of payroll deductions in both systems to confirm everything matched. The team found the process intuitive, and the more migrations they completed, the more efficient they became. At the end, they had successfully migrated 95 groups in five weeks. "I now feel as comfortable in Employee Navigator as I was in Ease after working in it for 15 years. If a client has a question, I know exactly how to fix it."

Navigating the Pain Points

No migration is perfectly seamless. Benefits Lab encountered a few technical hurdles: waivers could not be imported directly, some complications with HSAs, and Voluntary CI benefits had to be rebuilt to maintain carrier integration compatibility. When they did run into an issue, Employee Navigator's support team was at the ready.

"The support team was extremely responsive to the point where they reached out to me directly, dug into the issues, and fixed them. I was shocked, I'd never had an incoming call from Ease."

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab

Despite these friction points, their overall assessment was clear: "The migration was smooth; more went well than didn't."

"Just rip the Band-Aid off and get it done."

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab



Client Impact: A Seamless Experience

One of the biggest concerns for any broker considering a platform migration is how clients will react. Benefits Lab's experience should be reassuring.

Benefits Lab made a deliberate choice: clients weren't given the option to opt out, and the timeline was set around the migration, not around client anxiety. That decisiveness, mirroring the same approach they now recommend to other Ease brokers, produced zero complaints.

One story that stood out to Andrea particularly: "One of our clients just recently moved away from giving physical paper checks to their employees. This HR person is extremely analog, he doesn't even have internet at his house and was very apprehensive about moving. After going through open enrollment in Employee Navigator, he messaged us just to say how easy it was."

Clients barely notice a difference and what they do notice has been positive overall.

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab

For clients who wanted a walkthrough, Benefits Lab offered one. But most didn't need it. The platform's functionality was familiar enough in structure that HR admins could navigate it without hand-holding. "The functionality is similar, it's just more robust. Clients barely notice a difference, and what they do notice has been positive."

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Integrations: From Anxiety to Competitive Advantage

With 600+ integrations, Employee Navigator offers significantly broader connectivity than Ease. But for a broker with established carrier relationships, the real question was whether the transition would disrupt those connections.

Finding What Ease Missed

Benefits Lab started catching issues that had been quietly sitting in their clients' data for years; issues neither Ease nor the carriers themselves had flagged. One example stood out: a large client's prior admins had failed to bill for any worksite products for two full years. The client had been unknowingly absorbing 100% of the cost of a voluntary product. The migration surfaced the error.

“ *The data integrity is huge and the value that provides to the client monetarily is massive.* ”

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab

Employee Navigator's broader payroll integration ecosystem also opened doors that weren't available on Ease. More payroll vendors are supported, which means Benefits Lab can now extend that level of connectivity to a larger portion of their book. "The process is more involved but also more accurate. Once in place, integrations are a huge time saver. I'd rather do the work now to have everything be correct in the long run. The fact that Navigator has more payroll integrations than Ease did means we're able to provide that to more of our clients."

Benefits Lab has embraced a "trust but verify" approach to integrations: wall notifications remain on, and the team does a weekly check to confirm enrollments match wall events. Once in place, the integrations have become a significant time savings.

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Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab



Their experience with Employee Navigator's 600+ integrations has been broadly positive. They note that some could be enhanced; for example, additional HSA vendors accepting contribution data and more frequent change processing from certain carriers, but the overall integration ecosystem is a meaningful step forward. The Employee Navigator payroll team also earned a direct endorsement:

“

Employee Navigator's payroll team is great!

”

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab

Platform Features Worth Highlighting

What Benefits Lab Uses and Loves

- **AI Support Assistant** — used daily by the team (“it is very helpful!”)
- **AI Plan Build tool** — “this is really a cool feature!”
- **Migration tool** — smooth overall, used and recommended
- **Training webinars** — especially valuable for watching live demos
- **Support team** — “very helpful and very knowledgeable”

The Bottom Line

Benefits Lab's message to Ease brokers is the same message they wish someone had given them: the migration is the hardest part, and it's not that hard.

“

Take your time and learn from your mistakes. Check everything. Once you do a few, it gets easier. Use the migration tool!

”

Andrea Smith

Founder and Chief Benefit Scientist, Benefits Lab

“Everyone's scared of the unknown, of leaving something familiar. A broker's job is busy enough. Adding the responsibility of a migration is a lot. But if you just rip the Band-Aid off and get it done — right now, when you're usually out on your boat or golfing — and you won't have it looming over your head.”