TECH NEWS

The 'Who's on First?' of AI: Making sense of it all

by Jason Wolan, CIO

Jason Wolan is chief information officer at BeneSys Inc.

Everywhere you look these days, we humans are inundated with messaging about artificial intelligence, presented as an inevitability that will revolutionize our lives. Trade publications and mainstream media regularly cover the topic; social media channels, especially LinkedIn, are on a tear evangelizing the "undeniable" benefits AI will deliver. Wading through AI topics can sometimes feel a little like being in the classic "Who's on First?" comedy routine, with lots of room for misunderstanding and frustration. Let's clear up a little of that by explaining some common AI terminology and looking at BeneSys' position on AI adoption.
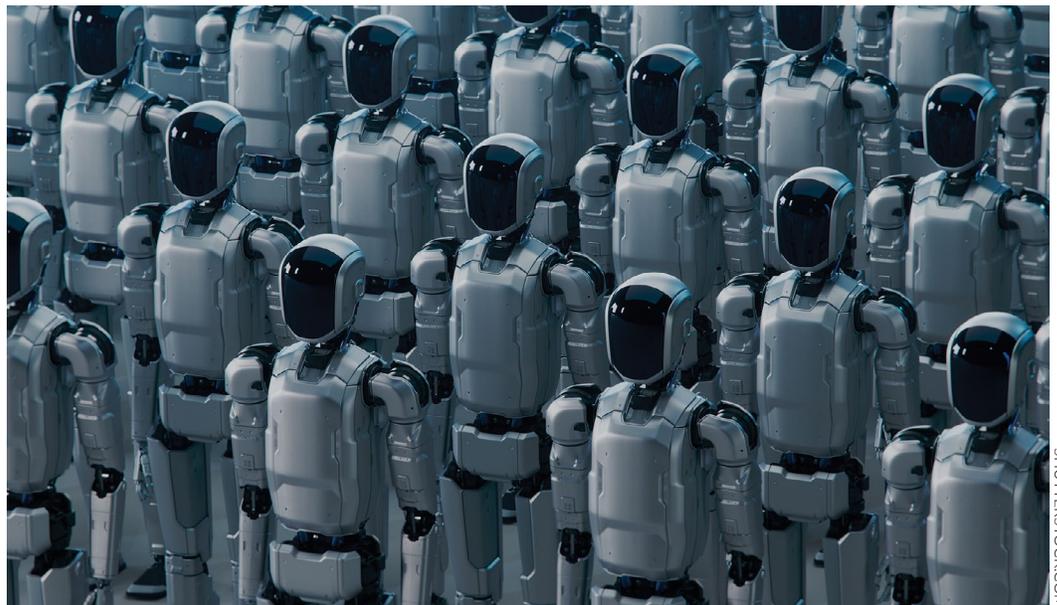
Who's AI? What's ML? I don't know RPA

The concept of AI has been around for quite some time, proposed in the mid-20th century as advanced ideas yet to be achieved. By the 1990s, early progress toward what we now understand to be AI began to take shape, referred to as machine learning, or ML.

A related technology is robotic process automation, or RPA, which is sometimes lumped in with ML or AI, but it can be distinctly differentiated as a system not capable of learning or reasoning from the data it interacts with. RPA systems represent automated repetitive tasks, with rules-based workflows that can replicate human actions. In general, these are rigid systems, programmed to perform very specific tasks, with decision-making limited explicitly to what's programmed.

For the purposes of this article, we're treating ML as a subset of AI capabilities: ML systems are able to learn from patterns in data and subsequently predict and/or make decisions based on that data, without explicit program-

LEADERSHIP

Meet our new chief client officer

Charles Besocke joined BeneSys this quarter as our new chief client officer, leading our plan administration team in providing timely, quality service to all clients. Charles, who began his career in union benefits in 2002, brings vast knowledge of plans and the unique needs of the trustees that oversee them. He is experienced in administering self-funded welfare plans, defined benefit plans, joint apprenticeship training funds, labor management cooperatives and promotional funds across many trade unions. Charles previously worked for BeneSys from 2009 to 2018, serving as the primary plan manager for numerous clients based on the West Coast and playing a key role on our business implementation team.

ming to make that decision. Common uses of ML include spam filters, fraud detection systems, targeted marketing analytics and even social media optimization — systems that have been present in our everyday lives for quite some time.

If ML can be viewed as a simplistic learning model, then other AI tools represent powerful systems that have been repeatedly trained and refined to interact with massive amounts of data and code to mimic human-like intelligence. Three tools that are having an increasingly significant impact, including in the Taft-Hartley space, are deep learning AI, generative AI and agentic AI.

- **Deep learning AI.** These solutions typically leverage large language models, or LLMs, which can be repeatedly trained to perform recognition/response tasks. These systems require significant effort, training and time before their accuracy achieves reliable human-like levels.
- **Generative AI.** These are familiar prompt-based solutions from common platforms such as ChatGPT, Google Gemini and Microsoft Copilot. They can generate all types of content, from text, images and music to more advanced productions of videos and even coding. Much like deep learning, generative AI is extremely dependent on training, context and learned patterns.
- **Agentic AI.** As the name implies, these agents typically mimic human behavior, acting autonomously to achieve goals using LLMs, vast amounts of data, and often additional tools and significant training. Common forms include chatbots and synthesized voice agents capable of dialogue. These agents can often work in the background as well, as non-human interactive agents that perform tasks.

A pragmatic approach

While the world seems to be busy forcing AI down everyone's throats, at BeneSys we are taking a pragmatic approach to AI adoption. We do use some RPA and ML to facilitate accuracy and efficiency in highly repeatable processes. RPA examples include automating processes to improve claim turnaround times and response time to our members, and ML

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examples involve solutions from our cybersecurity platforms that aid significantly in threat recognition and prevention.

Overall our approach focuses on AI as a workforce *enablement* tool, not a workforce *displacement* tool. BeneSys has formed an executive-level steering committee to develop an AI use policy and to standardize the processes and procedures by which we would evaluate and adopt any potential platforms.

Looking ahead

As stewards of our clients' funds who are mindful of what AI represents in the Taft-Hartley space, BeneSys takes the decisions around AI seriously. We will always prioritize a balanced approach where we carefully weigh the overall value that a solution may create for our clients against the risks of adoption, including any potential displacement implications. In a space as broad as BeneSys operates in, and with as many clients and stakeholders as we have, we recognize there will be conflicting opinions on if and how AI should be used. While there will always be challenges, BeneSys remains committed to acting in the best interest of our clients and delivering the best services possible as a third-party administrator. •

SpyGlass transition nears completion: A milestone for BeneSys and clients

Blake Holderread is vice president of marketing at Beacon Technologies Group, part of the BeneSys family of companies.

by Blake Holderread

Over the past several years, BeneSys has undergone a significant transformation that began with the acquisition of Beacon Technologies Group and has culminated in the transition from our legacy claims-processing system to the state-of-the-art SpyGlass platform. With the final phase scheduled to conclude this quarter, this milestone marks a major step forward for our organization, our clients and our partners.

Since launching the initiative, the BeneSys Conversion Factory Team has successfully transitioned more than 75 groups to SpyGlass. These transitions were executed with careful planning, close collaboration and a disciplined approach that kept accuracy, continuity and service quality at the forefront.

The operational outcomes have been substantial. SpyGlass has improved auto-adjudication rates by nearly 30%, dramatically reducing the need for manual claims handling. As a result, average turnaround times have improved and error rates have decreased, delivering consistently high accuracy and reliability across all clients. These improvements reflect not only the strength of the platform but also the dedication of our claims teams, analysts and operational leaders who have embraced new processes and tools that streamline their daily work.

Equally important are the day-to-day benefits for the BeneSys claims and service teams and, by extension, our clients. SpyGlass reduces repetitive tasks, increases visibility into claim status, and shortens training time thanks to its intuitive interface. The integrated Provider Portal has increased self-service opportunities, enabling providers to get answers quickly and allowing our Member Services team to focus on supporting members.

SpyGlass has positioned BeneSys strongly for the future. Its flexible configuration tools and proven implementation framework support more consistent and accurate client onboarding (we've completed more than 10 new client implementations), while allowing us to tailor solutions to each plan's unique needs. With this foundation we can continue to enhance service delivery and support new benefit designs.

For more information about SpyGlass, please visit beaconspyglass.com or contact our team at marketing@beaconspyglass.com. •

ABOUT BENESYS

BeneSys has been providing Taft-Hartley trust fund administration and IT services since 1979. Our dedicated specialists understand the nuances of Taft-Hartley benefit plans, and our software system, BenefitDriven, is designed to give our clients and their plan Participants the most efficient tools for self-administering trust fund accounts.

CORPORATE HEADQUARTERS
700 Tower Drive, Suite 300
Troy, MI 48098-2808
248-813-9800

WEST COAST HEADQUARTERS
7180 Koll Center Parkway, Suite 200
Pleasanton, CA 94566-3184
925-398-7060

BUSINESS DEVELOPMENT
National Sales Director
Thomas Lally: 401-378-1299
thomas.lally@benesys.com

SaaS Sales
Blake Holderread: 217-801-8911
bholderread@beaconspyglass.com

www.BeneSys.com

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Putting artificial and human intelligence to work

by Ed Wolyniec, CEO

Artificial intelligence is all over the news. In the cover story of this issue of the *BeneSys Navigator*, CIO Jason Wolan explains a number of AI terms, looks at how BeneSys is using AI today, and discusses our position on adopting future utilizations of this technology. Like many technologies, AI is another tool that, when used strategically, can directly benefit the members we serve by offering faster turnarounds on various types of requests along with greater accuracy.

One area where we rely not on AI but on human intelligence is our annual client satisfaction survey, which many of you completed at the end of last year. While we had a slight uptick in overall satisfaction, we also received some very constructive feedback on how we can do better. Our plan management leaders have been following up with those of you who gave us lower scores to ensure we address concerns. To all who gave us a satisfied score, thank you!

Also on the client services front, please join me in welcoming Charles Besocke as our new chief client officer (see story on page 2). He'll be leading our plan administration team in providing exceptional benefit services.

As always, you're welcome to email me anytime at ed.wolyniec@benesys.com to let me know how we're doing. Thank you for the opportunity to be your partner. •

Recognizing exceptional BeneSys employees

EMPLOYEE SPOTLIGHT: Stacy Sharp, client implementation

Who: Stacy Sharp, operations project manager for client implementation at our Troy, Michigan, headquarters.

Why she stands out: "Stacy is proactive about following up with departments to ensure things get done and projects stay on track," says Dayna Thorman, chief operating officer. "Her knowledge, reliability and collaborative approach make her someone we can always count on, and her contributions add real value to the organization and our clients."

History at BeneSys: Stacy started in March 2002 as an eligibility coordinator and then worked as an eligibility specialist, eligibility supervisor/manager and project manager in the Project Management Office before moving into her current role.

The most inspiring part of the job: "I get to work with all the departments, which allows me to get to know a lot of people in the company and learn different things. I enjoy being able to help wherever I can and being trusted to do so. I have a lot of years of historical knowledge that randomly comes in handy as well."

Creative outlet: "I work with my local community theater in the costume shop. I've helped sew costumes (made my first dress from scratch recently) to bring shows to life. I've even been in two musicals as a cast member on stage!" •