



# FINANCIAL ENGINES ENHANCES EMPLOYEE EXPERIENCE WITH IMMIGRATION TECHNOLOGY



## Financial Engines®

Founded in 1996, Financial Engines provides personalized financial guidance for the employees of Fortune 500 companies. The company provides objective, fee-based advice and asset management with the aim of building a better financial future for their clients

### Top Challenges:

- Lack of transparency: The old process left employees feeling frustrated and in the dark on their case status
- Communication: Lengthy email chains felt cumbersome and were hard to keep organized
- Middle-Man: HR was fielding a lot of questions for employees, but often did not know the answer

### INDUSTRY

Asset Management /  
Retirement Planning

### HEADQUARTERS

Palo Alto, California

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# FINANCIAL ENGINES **CASE STUDY**

Human Resources Manager Christina Vasquez had some immigration experience prior to joining Financial Engines. Even so, she realized that the company was struggling with the process, particularly when it came to providing her sponsored employees with the best possible experience.

Vasquez wanted to find a better immigration solution to reduce the number of employee complaints and provide a more holistic experience overall.

## **Technology Leads to a More Efficient and Transparent Immigration Process**

Before switching to Envoy, Vasquez typically communicated with an attorney via email, which can easily turn into a lot of back-and-forth. Other times, Vasquez wouldn't be copied on important emails, causing important case details to slip through the cracks.

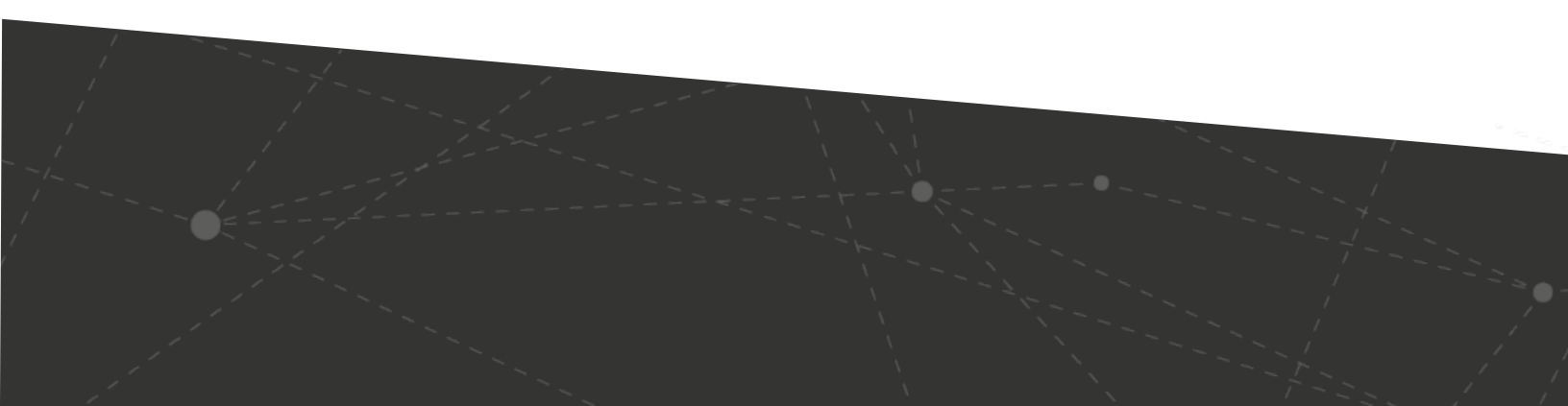
"As you can imagine, months later that came up and came to bite us," explained Vasquez.

With Envoy's Communication Center, Vasquez, her employees and their attorneys can all communicate within one central and secure platform. They no longer run into issues like forgetting to copy someone on an email or having trouble finding a certain communication. In fact, employees can ask their questions directly to their Envoy-affiliated attorneys and get a response back in as little as 30 minutes.

**"I like the Communication Center because I see everything, and I get a copy of it in my email. I'm seeing what's going on with employees, and I can see the replies in case anything comes up that needs my attention,"** says Vasquez.

Vasquez also adds that employees have a much easier time providing the necessary documents for their cases.

With Envoy, all documents are stored in one centralized portal and all communications accessed through the Communication Center, so HR teams and employees do not have to search their inboxes for important documents or worry about accidentally deleting something they will need later.





# FINANCIAL ENGINES **CASE STUDY**

## **Switching to Envoy Was Simple and Efficient**

The onboarding process helped Vasquez and the rest of her company easily transition from the old process to Envoy. She says the entire process was seamless.

"The whole [onboarding process] was very simple," says Vasquez. "Once I got a list of where our current employees were [in the process], I gave it to the Envoy team. Envoy and our dedicated attorney did a great job of doing all the heavy lifting for me."

It was that behind-the-scenes work during the onboarding process that helped improve the employee experience after Financial Engines partnered with Envoy.

"[Employees] didn't have to do much. The Envoy team helped me create onboarding materials for our employees, which included FAQs, the reasons we decided to switch, how we're going to improve the employee experience, what Envoy's platform can do, and what they were going to see from Envoy versus the old attorney," says Vasquez.

Vasquez also appreciates the customer service and response time from Envoy and its affiliated attorneys. She never felt lost during the onboarding process. In fact, she stated that employees have told her how much they love the attorneys because they answer quickly and there is help even when the lead attorney is out of office.

"If they're not hearing back from the attorney, they're hearing from her backup if she's out, or they'll hear from someone else on the team," says Vasquez.

At the end of the day, Vasquez feels more confident talking with employees about their case status because Envoy's technology simplifies and streamlines the immigration process. Before Envoy, Vasquez never felt secure talking to employees about their cases because there was a lack of updates. But that's all changed since Financial Engines partnered with Envoy.

"I actually know where things are, and I feel confident having employees talk directly to [the attorney] or the legal team," says Vasquez. "I feel like I have a team that actually backs me up and does everything they can to create a great employee experience."

