



# Open Enrollment Communications Planning

***BENEFITS***



A GUIDE TO

# Open Enrollment Communications Planning

## Contents

### **Laying the Foundation**

Introduction

Open Enrollment Planning: Best Practices

Forming a Partnership Between HR & Internal Communications

### **Open Enrollment Communication Strategy**

Setting Goals

Planning Your Communication Campaign

Monitoring in Real-Time

Post-Open Enrollment Review

### **OE Campaign Ideas**

Videos

App Posts

Incentives

Fact Sheets

### **Content Templates**

Editorial Calendar

PDFs

App Posts

### **Survey Templates**

Pre-Open Enrollment Survey

Post-Open Enrollment Survey

### **About theEMPLOYEEapp**

# Laying the Foundation

## Introduction

Even though Open Enrollment happens annually, this can be a challenging campaign to get right. Human Resources teams have their priorities each year. These priorities may include:

- Increasing enrollment in a certain benefit or type of plan
- Decreasing number of late enrollment requests
- Reducing the number of individual inquiries their team has to process

It's up to HR and Internal Comms to partner together to successfully communicate what benefits are, encourage enrollment by the deadline, and work towards the overarching goal of the program.

This is much easier said than done.

For a myriad of reasons, open enrollment is challenging. Despite our best efforts, it can feel like there is always a large chunk of employees who refuse to enroll on time. Or the volume of questions employees has remained overwhelming—even though those questions would have been answered if they read the packet or attended the meeting.

But it doesn't have to be that way.

In this guide, we will share our best practices and strategies to help you make open enrollment communication less of a headache while simultaneously driving towards your goals each year.

Let's dive in!

## Open Enrollment Planning: Best Practices

We will go into more detail later on in this guide regarding templates, surveys, and even campaign ideas that can break through. But we want to start with some of the high-level best practices that will set you up for success.

- 1. Start Early.** We don't just mean a few weeks early. Based on the size of your company and your goals for the year, you may want to start planning your communications the quarter before benefits enrollment opens up.
- 2. Learn From Last Year.** One tactic that we think is most important is conducting both a pre and post-open enrollment survey.
  - » If you survey immediately after open enrollment closes, you can learn from your mistakes. What did employees struggle with? Were employees disappointed with their benefits options? How long did it take?
  - » Surveying prior to open enrollment season as well offers other insights. A lot can change in about a year. What employees want may have shifted. Your benefits might have changed. You might have new employees. It's good to get a baseline here as well, and it gives you a chance to vet your intended strategy based on how last year's campaign went.
- 3. Make it a Team Effort.** We really believe that Human Resources and Internal Comms need to be strategic partners on large HR campaigns like open enrollment. If HR works on the communications plan in a vacuum and shows it to IC last minute, you aren't setting yourself up for success. The HR team may be the experts in the benefits themselves, but internal comms are the experts in communication. Not to mention, internal comms is likely aware of all the other competing initiatives that may be going on in parallel with open enrollment. But more on this shortly!
- 4. Mix it Up.** One potential issue we see is companies relying on the same strategy year after year but expecting different results. That's not to say that the copy isn't different or the number of messages doesn't change, but the overarching tactics don't really shift. Mainly, we see a heavy reliance on text-based communications. But it's possible that you need to diversify the mediums and channels you use to communicate to ensure you are reaching your entire audience and catering to different learning styles.

# Foundations

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## Forming a Partnership Between HR & Internal Communications

Open Enrollment is one of many campaigns that Human Resources will need to communicate each year.

On average, during a two to three-year cycle, companies provide training on ~12 topic areas for each employee. The [top three topics most likely to be covered by training programs](#) include:

- Code of Conduct (93%)
- Conflict of Interest (76%)
- Cybersecurity (69%)

These compliance tasks are time-sensitive and have broader organizational impacts when employees don't follow them. But it's historically been difficult for companies to get these messages to all employees in a way that is measurable. This challenge has a cost. In the past three years, [44% of companies](#) have faced "legal or external regulatory actions where a policy came under review as part of the action or defense."

The ability to get messages through to *all* employees and focus on why they need to complete each of these tasks is even more complicated. Especially to your frontline teams who lack access to intranets or corporate email. So, where is the tipping point? The answer to this question is in the partnership between HR and Internal Communications.

The IC function has long been refining its comms approach, developing a calendar, and understanding the channel and timing of messages out to the workforce. Together, these teams need to develop a multi-touch and channel strategy, that includes mobile, to communicate these critical messages.

But how?

- 1. Meet Regularly.** We believe that internal communications should host a biweekly or, at least, monthly meeting with all major stakeholders in the organization. HR needs to be one of them. And depending on how much communication HR needs to share with employees, you might even want a separate, dedicated meeting between HR and IC. By meeting regularly, you increase transparency between these two teams and align on goals.
- 2. Take a Metrics-Focused Approach.** Another key to success is to not just let internal comms be the creator of communication but to become strategic partners. HR should share their business objectives with internal comms—we're talking retention goals, OE targets, etc. Not just to increase visibility on HR initiatives. By shifting into this mindset and focusing on the larger driving forces behind each campaign, internal comms will be better able to position each message and really add value to the HR function.

# OE Communication Strategy

## Setting Goals

Setting the right objectives for your open enrollment strategy will be key to success. These goals might be based on the business's core objectives and/or based on the results of last year's open enrollment campaign.

As we mentioned at the start of this guide, these goals might look very different year to year and at different companies. But a few examples might be:

- Increasing enrollment in a certain benefit or type of plan (e.g. for 25% of employees to enroll in our new pet insurance benefit)
- Improving participation on time (e.g. for 30% more employees to enroll by the deadline than the previous year)
- Reducing the number of individual inquiries their team has to process (e.g. decrease the number of emails/calls we receive about enrollment by 50%).

Remember that objectives have to be **SMART**:

- **Specific.** You have an actual number associated with the goal. It's not enough to say increase participation in open enrollment on time. You should target a specific percent increase or percent participation overall. That's how you'll know if you were successful or not.
- **Measurable.** Your goals have to be something you can actually measure. If your goal is to decrease feelings of being overwhelmed by open enrollment, but you have no survey or way of measuring that sentiment, well, you'll never know if you were successful outside of anecdotal evidence.
- **Attainable.** It has to be something that you believe can be achieved. It's great to set a lofty goal... if you think you can achieve it. For instance, achieving 100% on-time enrollment might never be possible at a company with 70,000 employees.
- **Relevant.** Naturally, your goals should be related to the campaign and your business goals.
- **Time-Bound.** Remember to set goals that you can measure in a certain time frame. That helps you measure success. If your primary goal is to increase participation in benefits overall, you might have multiple goals at different milestones. For instance, you might strive to have 25% enrollment the first week that enrollment opens. Then maybe it's 50% at the halfway point. And 90% by the deadline. But this helps you measure all these key time frames. You might meet your 90% goal but miss the other two, which backloads the work for HR. That helps you pivot your strategy for next year to try to reach a more optimal pace for enrollment.

## Planning Your Communication Campaign

Once your goals are clearly defined, you can start planning a strategic open enrollment campaign. So, let's pretend that our three main objectives are:

- For 25% to enroll in the new benefit: pet insurance.
- To have 30% more employees enroll by the deadline than the previous year.
- To decrease the number of emails/calls we receive about enrollment by 50%.

We think the next key step for planning the actual communication is to understand what the challenges or roadblocks are that we'll need to overcome to hit those targets. In many cases these are the main challenges:

- **Employees don't understand their benefits.** This shouldn't be terribly surprising, especially for employees new to the workforce, employees for whom English is their second language, or even for tenured employees who haven't ever understood it because it's never been explained well to them.

Even though you think the package comparison chart you created explains everything...those charts are often full of jargon and don't clearly define key terms/concepts. What is a deductible? What's the difference between an FSA and an HSA? What kind of 401k do I want? It can be a bit overwhelming.

- **Employees don't spend much time on enrollment.** SHRM found that 73% spend less than an hour and 41% spend less than 30 minutes on open enrollment. Whether this stems from a lack of time or a lack of understanding is up to you to uncover at your organization.
- **Not all employees have access to the same channels.** It's possible that you haven't conducted a channel audit in a while and don't realize that segments of your employee population aren't receiving all the open enrollment communications you've been sending.

Your frontline employees, for example, may not have email addresses or Intranet access. Did they miss that FAQ you sent? Or those reminders leading up to the deadline? This can result in employee groups not even knowing what benefits are available to them.

# Strategy

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Let's assume we have to contend with all three of these challenges to hit our goals. That means we need to take a few things into account:

- **We need to make sure we provide all employee segments with at least one primary channel for communication** outside of face-to-face with a manager. And that channel needs to be accessible outside of the workplace. That's important for open enrollment because most employees will enroll in their benefits outside of work. Maybe they need to review it with their spouse. Maybe the nature of their job prevents them from enrolling at work (e.g. they work in a hospital or in a warehouse).
- **We need to make sure we are addressing confusion up front.** This is where our surveys can really help us hone in on the key questions we have to address in our communications.
- **We need to diversify how we communicate** open enrollment to improve understanding.
- **We might need to find a way to give employees more time to enroll.** If employees are spending minimal time enrolling in benefits due to a lack of understanding, this likely isn't the issue. But if they are spending the minimum amount of time due to a lack of *time*, you may need to adjust. We might do that by:
  - » Starting to communicate about benefits sooner. If you wait to explain benefits when the enrollment window opens, this can be very stressful for employees who don't understand.
  - » Providing more live explainer sessions or one-on-one help sessions to ensure all employees who want to attend have the ability to.
  - » Can you extend the enrollment window?



ENROLL



With all this knowledge, you might put together a plan that looks something like this:

Date	Message/Deliverable	Medium	Channel(s)
August	Meeting with stakeholders to set goals/plan	Meeting	--
9/1 - 9/10	Pre-open enrollment survey	Survey Link	App, Email, Intranet
9/1 - 9/10	Comms to managers to remind teams to take the survey.	Text	Email, App
9/11	Meeting with stakeholders to review survey results and shift the plan, if needed.	Meeting	--
9/17	Kick off message that includes: <ul style="list-style-type: none"> <li>• When OE is happening (&amp; key dates for sessions)</li> <li>• Survey results &amp; how you will address concerns</li> <li>• Points employees to the resource hub</li> </ul>	Text	App, Email, Intranet
9/22 - 9/31	Share messages leading up to enrollment that explain what the benefits are (including changes). Pro Tip: Create a separate manager open enrollment guide that helps prepare them for employee questions.	Text + Video	App, Email, Intranet
10/1 - 10/16	Virtual/in-person training sessions. These should be geared towards answering questions, reviewing pre-defined FAQs, and how to actually enroll. Pro Tip: Don't host one session. Host multiple sessions on different days of the week and times of day to give everyone an opportunity to attend live.	Meetings	Conferencing tool & in person  Recordings hosted on Intranet + App
10/17	Follow-up FAQ from training sessions	Text + Video	Intranet + App
10/17 - 10/21	Targeted communication to managers with talking points and enrollment reminders.	Text	Email + App
10/21 - 10/29	Included reminders in all regular communications, linking to resource hub.	Varies	App, Email, Intranet
10/30	<b>Final reminder: tomorrow is the last day to enroll!</b>	Varies	App, Email, Intranet
11/1 - 11/15	Post-open enrollment survey	Survey Link	App, Email, Intranet
11/1 - 11/15	Comms to managers to remind teams to take the survey.	Text	Email + App
11/16	Meeting with stakeholders to review survey results.	Meeting	--
11/21	Share results of the survey and top takeaways that will be considered for next year.	Text	App, Email, Intranet

*\*This plan assumes open enrollment opens on October 1st and closes on October 31st. Since everyone's open enrollment window might be different, you would want to modify this based on your own plan and parameters.*

# Strategy

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## Monitoring in Real-Time

While your campaign is running, it's important to continue checking your metrics to ensure you are staying on track. In addition to looking at open rates on messages and attendance rates at your training sessions, keep an eye on:

- **The number of employees who have enrolled in benefits.**
- **The number of employees who have enrolled in your new benefit.** If you find that the adoption of this benefit is low, you might decide to pull together a quick focus group with a sample of employees and get their thoughts or to create a featured communication on that benefit.
- **The number of one-off questions your team receives about open enrollment.** Analyze whether these questions were answered in the materials you provided or not. If you think the answers were included, assess if you could make that clearer.
  - » **PRO TIP:** Track what the most commonly asked questions are throughout open enrollment to create FAQs in real-time and to inform your strategy for next year.



## Post-Open Enrollment Review

For a campaign as big and important as open enrollment, you might find it useful to have a “post-mortem” with all stakeholders to review how it went. This can be included in your meeting to review the post-open enrollment survey results to cut down on the number of meetings you have to book.

This review meeting should cover:

- **If you met your primary objectives.**
  - » If not, discuss what you think went wrong, using survey results to back up your hypotheses. You may also choose to do a focus group with employees to confirm theories and pressure test solutions for the following year.
  - » If you did meet your goals still talk about what you think went right. What tactics were effective and what maybe wasn't necessary? This can be a great time to do a Stop, Start, Continue Analysis of your Open Enrollment Campaign.
- **How each team feels about how the campaign went.** Did you hit your goals but have a lot of sleepless nights and last-minute pivots? Or maybe one team feels like they put in way more effort than other stakeholders who could have been delegated to? Talk about how you worked together and how things ran in real-time.
- **What did employees have to say?** Using anecdotal feedback, your survey results, and even the questions that the HR team received throughout the campaign, can you paint a picture of what the employee experience was like? Try to take this one step further and analyze how that experience differed for each of your employee groups. For example, is your benefits participation rate far higher among deskbound employees compared to frontline managers? Did one group of employees submit far more questions than others?
- **What is your action plan for next year?** Instead of waiting a year to create your go-forward plan, start outlining it while it's fresh. Do you feel like you need to push your start date back and give yourself more time? Are there other teams who should have been more involved earlier in the process? Determine what these major shifts are going to be ahead of time.

# Open Enrollment Campaign Ideas

One thing that might be holding you back with getting your employees to engage and then take action on open enrollment communications is your approach.

While the official documents might have to be written a certain way, do all of your messages strike that same, bland tone? Are they all text? Are they at all interesting? Do they stress what's in it for your employees?

If you answered “no” to any of those questions, check out some of these campaign ideas to drive better engagement.



## Videos

Video is a great medium to use for explaining complex subject matter! Here are a few videos you might consider using in your open enrollment communications campaign.

### Overview Video

When you first start communicating about open enrollment, just handing employees a hefty PDF might be a bit overwhelming. And for those who might be a bit anxious about benefits enrollment, they might disengage right off the bat.

By starting with an overview video, you can help explain the basics of what benefits you offer and if any benefits are new or have changed.

Tips for Success:

- Try to keep it short. Even though there's a lot to cover, remember that this video is meant to give an overview. Employees who might get intimidated by a 20-page PDF document will likely also be turned off by a 30-minute video.
- Use supporting visuals. We are 100% advocates for putting key subject matter experts behind the camera, but for complex subjects like this, you'll definitely want to include animation or videos to reinforce your message and help it stick.

## Detailed Breakdowns

When appropriate, you might find value in creating more detailed explainer videos for each benefit. These can then live in a library of resources that employees have access to all year long. They are great for teaching employees about specific benefits but also for reminding them about the details of their benefits after they've enrolled and actually go to use them.

Tips for Success:

- **Detailed doesn't mean feature-length.** Just like with your overview, you want to balance sharing the necessary information with droning on for too long.
- **Include a transcript.** Transcripts with time codes can be really helpful for employees who are looking for specific answers or reminders. When you include a transcript with videos that also has the time codes for certain topics/themes within the video, this can make these videos much more user-friendly and save employees time.
- **Use supporting visuals.** Again, visuals in all your videos are going to be really helpful for educating and helping employees remember key messages.

## Reminder Videos

Whether you include reminders in existing, regularly cadence videos you share, or you create a specific reminder video for your app or Intranet, these can be a great opportunity to stress:

- Why open enrollment is important—and why meeting the deadline is so critical!
- The great benefits you offer and the options available to employees with tighter budgets.

# Ideas

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Tips for success:

- **Feature a trusted authority.** Whether it's your Chief Human Resources Officer or CEO, putting someone on camera for quick reminders can show employees that a message is important. We are hard-wired to see our executives and be more likely to tune in and listen to their messages.



## App Posts

When you have an employee app, you open up a whole new world of possibilities for your internal communication content. Apps allow you to tap into more multimedia content, better targeting, thread commenting/engagement, and truly create intuitive hubs for resources.

On theEMPLOYEEapp, you can put individual posts together that don't need a push notification associated with them. This allows you to create more features or supplementary content without pinging your employees. And then, when you have your weekly or regularly scheduled content, you use a push notification, which brings employees into the app and they can then see all the other content you've been sharing.

By not "overloading" or inundating employees with too many notifications about open enrollment, you create layers of content they can choose to engage with when it makes sense without overwhelming them.

You might consider:

- Weekly posts featuring a benefit and why it's worthwhile for employees to enroll.

# Ideas

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- Short podcasts that talk about frequently asked questions like what's the difference between an FSA and HSA—honing in on the key question there, “which one is right for me?”
- Video posts featuring employees talking about why they like certain benefits (like that new pet insurance offering!) or having subject matter experts come on to talk about certain topics—like your 401k.



## Incentives

Depending on your workplace culture, a little healthy competition or incentive might help get your employees engaged and activated. You don't have to spend a ton of money for this to be effective either.

Here are a few ideas:

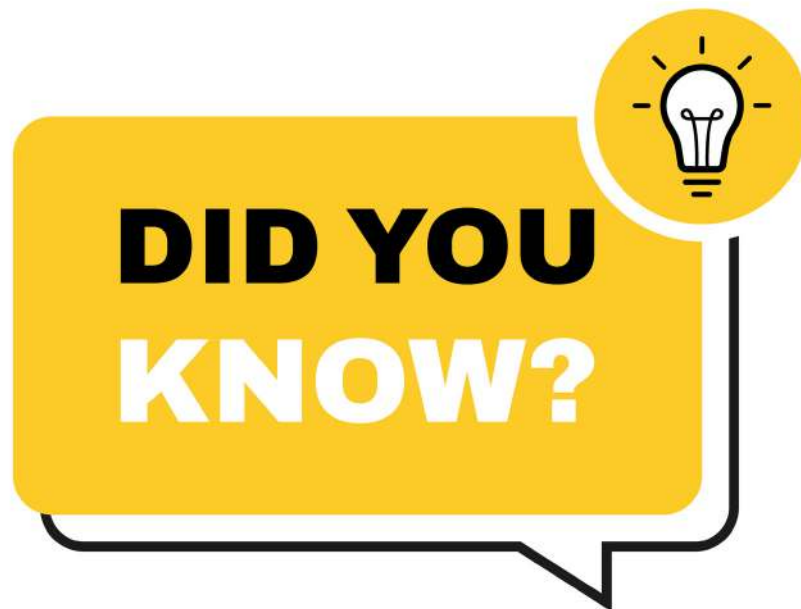
- Add a quick trivia game to the end of your benefits overview meetings and award prizes for first, second, and third place.

# Ideas

CONTINUED

- Have a raffle where you draw names of everyone who have attended your various enrollment trainings and help sessions. The person who's name is drawn gets a prize.
- Incentivize enrolling on time by gamifying it.
  - » You could host another raffle where employees have their name entered a certain number of times based on when they enroll.
  - » Or you could have your early bird employees be entered into a raffle to win a BIG prize. And then the prizes can get smaller each week until the deadline.

The sky's the limit here! Whatever your goal is, you can certainly create a contest or game to incentivize that desired action.



## Fact Sheets

As great as the official documentation for benefits are...it can be a lot to look through. Creating single-page fact sheets on the benefits you offer can help employees more quickly find the answers to their questions.

Think of these kind of like those quick videos that explain the benefits. They are a nice compliment to a video series and a must if you don't have the time, budget, or ability to create videos.



# Content Templates

## Editorial Calendar

If you don't already have an editorial calendar where you track all your internal communications, we've got you covered!

And even if you do, check out our example to see if there are any fields your calendar is missing that you might benefit from adding.

[Download](#)

## PDFs

We have created editable versions of our PDF fact sheets that you can use and modify for your organization's needs. Keep in mind that these can be printed and shared on-site and/or hosted digitally.

[Download](#)

## App Posts

If you already use theEMPLOYEEapp or are interested in using an app, download these editable templates for thumbnails and mobile-optimized PDFs.

[Download Thumbnails](#)

[Download Mobile PDFs](#)

# Survey Templates

## Pre-Open Enrollment Survey

Like we've mentioned, using a pre-open enrollment survey before kicking off your open enrollment campaign can be a great way to:

- Assess if your strategy has any holes in it
- Understand what the pressing issues or questions are about benefits enrollment
- Learn how employees want to learn about enrollment and go through the enrollment process

Here is a list of questions you might want to include in your pre-enrollment survey:

### Would training sessions for open enrollment be useful to you?

- Yes  
 No

### How would you prefer to learn about your benefits? (Select All That Apply)

- Videos  
 Text-based (PDFs, guides)  
 In-Person Meetings  
 Virtual Meetings  
 Podcasts  
 Other: [fill in answer]

### How much time do you intend to take enrolling in your benefits?

- Less than 1 hour  
 1 - 2 hours  
 More than 2 hours

### What was the most difficult part about enrolling in benefits last year? (Optional)

Open Response Answer

## Post-Open Enrollment Survey

Getting feedback from your employees after enrollment closes is another great way to understand how your strategy/campaign went. This will help you:

- Make changes for next year.
- Dig deeper into persisting challenges.
- Understand if there were benefits missing that employees would really like to see in the future.

Here is a list of questions you might want to include in your pre-enrollment survey:

**To what degree do you agree with the following statements:**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am satisfied with the benefits available to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied with the health benefits available.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied with the 401k plan options I have.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied with my time off benefits (sick days, PTO, family/medical leave).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Are there benefits that weren't available that you would have liked access to?**

- Yes  
 No

**On a scale of 1 - 5 (5 being the best), how would you rate the overall benefits enrollment experience?**

- 1      2      3      4      5

**Did you feel like you had a long enough window to enroll in benefits?**

- Yes  
 No

**How easy was it to enroll in benefits in our HRIS system?**

- Very Difficult  
 Difficult  
 Neither Difficult Nor Easy  
 Easy  
 Very Easy

# Templates

CONTINUED

To what extent do you understand your benefits? (1 = not at all, 5 = completely)

1      2      3      4      5  
           

What benefits were most difficult to understand? (Select All That Apply)

- Medical Benefits
- Dental
- Vision
- Time Off
- Annual Leave
- Life Insurance
- Pet Insurance
- Special Discounts

Did you know who to contact with questions?

- Yes
- No

Did you know where to find resources and additional information?

- Yes
- No

How satisfied were you with the amount of communication/training you received for benefits enrollment?

- Completely Dissatisfied
- Somewhat Dissatisfied
- Neutral
- Somewhat Satisfied
- Completely Satisfied

Follow Up: Why were you satisfied or dissatisfied?

- Too much communication
- Not enough communication
- The information communicated wasn't helpful
- I received information too late in the process
- I received information too early in the process
- Other: [Write In Answer]

# Templates

CONTINUED

## What could we have done better during and/or leading up to open enrollment?

[Open Response Answer]

## If you could change one thing about you benefits next year, what would it be?

- More Options
- Better Options
- Cheaper Options
- Other: [Write In Answer]

## Which benefits are most important to you? (Select up to 3)

- Health Insurance (Medical, Dental, Vision)
- 401k
- Vacation Time
- Pet Insurance
- Paid Leave (Family/Medical)
- Life Insurance
- Disability Insurance
- Other: [Write In Answer]

## What additional benefits matter to you? (Select All That Apply)

- Adoption/Surrogacy Assistance
- Childcare Benefits
- Flexible Work Schedules
- Gym Memberships or Discounts
- Mental Health Support
- Student Loan Repayment
- Tuition Reimbursement
- Wellness Programs
- Other: [Write In Answer]

# About theEMPLOYEEapp

theEMPLOYEEapp was created by communications and HR professionals to address the challenges organizations face communicating with a dispersed and deskless workforce. theEMPLOYEEapp is an internal communication and engagement solution that allows workers to have fast and easy access to the information, documents, and resources they need to succeed in their work.

Our app allows you to target information to your employees when and where they need it on their smartphone, tablet, or computer, and empower leaders and frontline managers to engage and activate employees across the organization. Unlike most traditional communications channels, theEMPLOYEEapp creates a customized, branded experience for employees, encouraging your workforce to join together in a single, centralized channel.

**Our Mission is to enable the effortless flow of meaningful information for organizations driven by frontline workers.**

[Request a Demo](#)

