OPEN ENROLLMENT CHECKLIST

DID YOU KNOW

36% of employees find their current enrollment experience "extremely confusing"

49% say making health insurance decisions is always very stressful for them?

55% want more help from their employer*?

With open enrollment just around the corner, now is the perfect time to make sure you have everything ready to help your employees make this enrollment the best yet.

USE THIS CHECKLIST TO GET A JUMP-START. **AND LET US KNOW HOW WE CAN HELP.**

REWIND

Analyze the past to prepare for the future:

- ☐ What worked well last year?
- ☐ What could've gone better?
- ☐ What was time-consuming? Can it be streamlined?

BE ACTIVE

Active enrollments better engage employees to help them understand their benefits:

- ☐ Ensure each employee must review their benefits and re-select/approve them.
- ☐ Decide what incentives you'll be offering to drive specific behavior.

CHOOSE HOW

The method you use to conduct the enrollment is just as important as the enrollment itself. Will it be:

- ☐ In-person?
- ☐ Telephonic?
- ☐ Online?
- ☐ A combination?

KEEP IT SIMPLE

Pretend you're explaining benefits to someone who has never even heard of insurance. How would you change your language?

- ☐ Remove or simplify all insurance terms and jargon.
- ☐ Use words and examples employees can easily understand.
- ☐ Break up your messages into bite-sized bits for easy consumption and understanding.

WIIFM?

Simply explaining the benefits offered and their costs does nothing to help the employee understand 'what's in it for them.'

- ☐ Explain why an employee should care about or choose the various benefits.
- ☐ Give real-life examples that resonate with their lives and situations.

COMMUNICATE

Ever heard the phrase: 'Tell them what you're going to tell them, tell them, then tell them what you told them.'? The same applies to your benefits communications.

- ☐ Appeal to the three different learning styles, creating communications for auditory, visual and tactile learners.
- ☐ Decide which media you'll use: Group meetings, direct mail, email, social, podcasts, intranet, videos, etc.
- ☐ Think about the timing of your campaign communications.
- ☐ Always incorporate the WIIFM.

ENLIST HELP

Holding an effective, efficient and successful open enrollment can be time-consuming and challenging. Don't be afraid to ask your trusted benefits expert for help.

Want to take a deeper dive into all the nuances of how you can plan for your open enrollment this year? Check out our ebook, 8 Steps for a Smooth, Successful Enrollment, and reach out for more information.

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