

# Goal-Setting Worksheet



## Mark Your Calendar

### What are your Open Enrollment milestones?

Plan year \_\_\_\_\_

Benefit decisions final \_\_\_\_\_

Open Enrollment dates \_\_\_\_\_

Open Enrollment meetings \_\_\_\_\_

Open Enrollment communications due \_\_\_\_\_

Mail dates \_\_\_\_\_

## Goals & Objectives

### What do you want to accomplish this year? Here are some popular targets to aim for:

- |  |   |
|--|---|
| <input type="checkbox"/> Answer common employee questions        | <input type="checkbox"/> Increase engagement/click rates/views  |
| <input type="checkbox"/> Boost benefits knowledge                | <input type="checkbox"/> Increase preventive care utilization   |
| <input type="checkbox"/> Communicate upcoming changes            | <input type="checkbox"/> Increase utilization of specific plans |
| <input type="checkbox"/> Decrease questions to HR                | <input type="checkbox"/> Lower out-of-network utilization       |
| <input type="checkbox"/> Employee appreciation of benefits value | <input type="checkbox"/> Reduce unnecessary claims              |
| <input type="checkbox"/> Encourage participation in programs     | <input type="checkbox"/> Other _____                            |
| <input type="checkbox"/> Improve employee self-reliance          |   |

# Key Messages



## Which benefits, programs, or action steps need to be highlighted to best support your goals?

Example: If your goal is to increase employee self-reliance, emphasize where they can go for answers.

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# Get the Word Out



## Which communication methods will have the biggest impact on your employees?

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|---|--|
| <input type="checkbox"/> Benefit Guides (Traditional: Print)    | <input type="checkbox"/> Newsletters                   |
| <input type="checkbox"/> Benefit Guides (Nav-enhanced: Digital) | <input type="checkbox"/> Postcards                     |
| <input type="checkbox"/> Benefits at a Glance                   | <input type="checkbox"/> Posters                       |
| <input type="checkbox"/> Benefits Hub (Website)                 | <input type="checkbox"/> Self-guided Presentations     |
| <input type="checkbox"/> Decisions Guides                       | <input type="checkbox"/> Total Compensation Statements |
| <input type="checkbox"/> Flyers                                 | <input type="checkbox"/> Videos                        |
| <input type="checkbox"/> Gateway (Mobile Web App)               | <input type="checkbox"/> Other _____                   |
| <input type="checkbox"/> Hero Sites (Electronic Postcards)      |  |