

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:

- | | |
|--|---|
| ☐ Answer common employee questions | ☐ Increase engagement/click rates/views |
| ☐ Boost benefits knowledge | ☐ Increase preventive care utilization |
| ☐ Communicate upcoming changes | ☐ Increase utilization of specific plans |
| ☐ Decrease questions to HR | ☐ Lower out-of-network utilization |
| ☐ Employee appreciation of benefits value | ☐ Reduce unnecessary claims |
| ☐ Encourage participation in programs | ☐ Other _____ |
| ☐ 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.

1. _____
2. _____
3. _____
4. _____
5. _____

Get the Word Out



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

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