

Open Enrollment Checklist



BEFORE

- ➔ **Start early:** Benefits-savvy employees make Open Enrollment easier. Create a year-round benefits communication plan to help your employees stay engaged.
- ➔ **Set your sights:** Define your Open Enrollment goals. Identify key targets based on feedback, notes, and survey results from last year. Need help? Use our **goal setting worksheet**.
- ➔ **Pick your pieces:** Choose how you will communicate your company's benefits to employees. A variety of communication channels is key! Browse our **menu of products** for inspiration.
- ➔ **Schedule your sessions:** If you're having Open Enrollment meetings or information sessions, send out invites to save the date and get started on planning.



DURING

- ➔ **Introduce incentives:** Offer raffle prizes or fun rewards to get employees excited about enrolling.
- ➔ **Roll out reminders:** Schedule regular reminders for employees to enroll by the deadline. Use our Open Enrollment **video** and **badges** in your communications to help employees recognize important Open Enrollment information.
- ➔ **Just the FAQs:** Keep track of the questions employees are asking. Compile the answers in a **Frequently Asked Questions** document for a one-stop resource.
- ➔ **Connect with your team:** Reach out to your well-being champions, managers, and team leaders to provide support and ensure your goals are on track.



AFTER

- ➔ **Survey your squad:** Get input from your team and ask your employees about their enrollment experience. Need help creating and sending **surveys**? We can take that off your to-do list.
- ➔ **Learn the lessons:** Take a moment to consider what went well and where improvement is needed. Document bright spots and pain points to improve processes going forward.
- ➔ **Let your benefits shine:** At the start of the new plan year, send **Total Compensation Statements** to show employees the value of their benefits.
- ➔ **Look ahead:** The benefits conversation goes beyond Open Enrollment. Tweak your on-going benefits communication campaign to meet the changing needs of your employees.

WELL-BEING MOMENT

Open Enrollment can be overwhelming. Be sure to plan self-care on a regular basis to reduce stress. Try deep breathing, guided meditation, or yoga. Start Open Enrollment from a place of peace.

YOU'RE WORTH IT!



WELL-BEING MOMENT

During Open Enrollment, self-care may be the last thing on your list. But it shouldn't be. Take time for periodic breaks, eat healthy meals, and get quality sleep during these weeks.

YOU'VE GOT THIS!



WELL-BEING MOMENT

Congratulations! You made it through Open Enrollment! Now, it's time to celebrate. Take some time for yourself—get a massage, spend time with a friend, or enjoy a special dinner.

YOU'VE EARNED THIS!

