



Plan Ahead

Employee Benefits Enrollment & Engagement Playbook

Your game plan to help you and your workforce make the most of your benefits.

Benefitfocus[®]



Welcome!

It's time to plan ahead to get ahead – and make sure your next benefits year is a smash hit!

Open enrollment may be the star of the show, but it takes every part of a health and wellness program – benefits education, communications, engagement opportunities – for it to not only top the box office but make your employee culture a classic. So, while some may assume that open enrollment season is only about those two weeks, the truth is there's a lot more going on behind the scenes. We created this playbook to make it easier to get ahead on planning for your next benefits year.

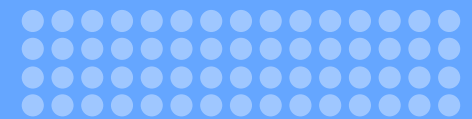
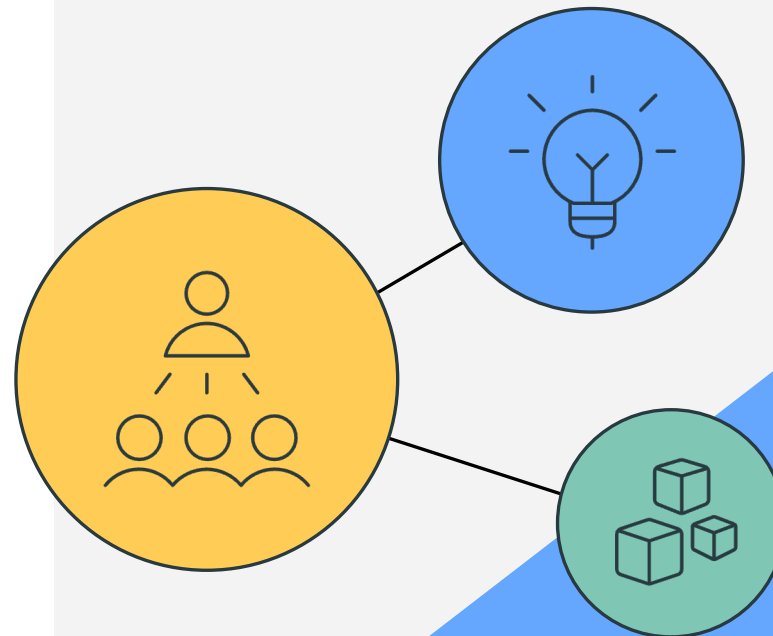


Use this playbook to help guide your efforts and to serve as a resource to:

- ✓ **Identify opportunities to connect** with employees through timely events related to employee benefits.
- ✓ **Explore best practices** for employee communications that boost awareness, spark interest and drive action for ongoing benefits engagement.
- ✓ **Get inspired by compelling ideas** tested by benefits administrators at top employers to make your benefits program more fun and engaging for employees and their families.

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Your At-a-Glance Game Plan

Plan Ahead to Get Ahead

Employee benefits are part of the employee experience. They have the power to address your people's needs and create an employee value proposition that resonates inside and outside of your organization.

Benefits enrollment and engagement is bigger than OE (just don't tell OE that, okay?).

It's a year-round effort that encompasses everything from education to communications and engagement. For your HR team, the spotlight is on getting every aspect of it right, especially if you're facing talent gaps.

Of course, open enrollment is incredibly busy for you and your team. But that time right after open enrollment wraps up and before you launch into a new plan year is the perfect opportunity to take a broader view of your benefits strategy.

So, what does your vision for your benefits program look like? This playbook will provide tips and insight to help you hone it!

- **Objective: Set your vision for your benefits strategy and create a plan to help you execute it with ease.**



Steps:

Determine your goals and/or objectives.

Make your goals S.M.A.R.T.

Map actions to goals.

Prioritize goals and actions into a plan.



Resources:

OE task force:

HR teammates

Employees

Internal stakeholders
(i.e., IT team, executives)

Benefits technology
& service vendor(s)



Wins:

Focus your benefits strategy for the upcoming year.

Establish meaningful metrics that help you improve your benefits strategy execution.

Strengthen your employee value proposition.

Enable your employees to get more value from their benefits.



Vision is the art of seeing what is invisible to others.”

Jonathan Swift



Determine Your Goals for the Year Ahead

It's time to map out your vision for the year ahead. That can seem daunting, so start by reflecting on what went right (or wrong) over the past 12 months. Then, consider the goals that can help you improve upon those areas.

One way to help ensure you're emphasizing all areas of benefits enrollment and engagement is to consider bucketing your goals into these four areas:

Administration: Related to the efficiency and quality of your OE processes, both manual and automatic, including those related to your HR technology and benefits partners.

Communications & Engagement: Related to reaching employees at the right time, in the right way with the right messages – and whether enough was done to drive the desired actions.

Enrollment & Utilization: Related to the benefits employees sign up for and how they access and use them.

Employee Experience: Related to employees' perception of their benefits and employer brand, benefits enrollment process and workforce culture.

Nearly two-thirds – 64 percent – of employers say they are planning to enhance their health and well-being offerings in 2024 to support attraction and retention and better meet employee needs.

[Mercer's Health & Benefit Strategies for 2024 Survey Report](#)

Food for thought on benefits strategy priorities:



Creating better employee experiences

Today's employees want to feel seen and understood as well as be part of companies that commit to well-being and DEI. Companies that consider the individual employee experience and make progress towards representing those will likely come out on top.



Improving total comp (pay + benefits)

Attracting and retaining talent in a tough labor market requires a broader look at how the convergence of health and wealth contributes to engagement and the sense of belonging. Compensation alone and, conversely, benefits alone won't drive it, but a well-designed benefits program paired with annual pay audits that track towards pay equity likely can.



Adjusting benefits strategies to meet diverse needs

Every workforce is unique, so as Mercer notes in their Health & Benefit Strategies for 2023 Survey Report, "taking a standard approach to benefit design is guaranteed to come up short," when it comes to talent retention. Consider grouping employees by lifestyles, attitudes and preferences to better understand needs and craft a benefits program that aims to better addresses them.



Being strategic with data + analytics

Exit interviews are the wrong time to find out why someone was unhappy with their employee experience. Allow employees to share their thoughts throughout the year in online questionnaires, ERGs or HR 1:1s. Plus, use data from annual open enrollment to dive deeper.



Getting help from partners

Benefits partners have a stake in your success, so turn to them for a fresh look and insights around your company's trends.



Make Your Objectives S.M.A.R.T.

Your objectives are your desired outcomes. It takes thoughtful consideration to set your goals, and to see success at the end takes creating a clear picture of how to go about achieving them. That's where the S.M.A.R.T.* acronym comes into the scene:

- ✓ **Specific:** Is the objective direct, clear, and unambiguous?
- ✓ **Measurable:** Does the objective say how it will be measured, in terms of quality or quantity? Is it trackable?
- ✓ **Actionable:** Are there actions you can take to achieve the goal?
- ✓ **Relevant:** Does the objective align with the overall goals of the organization? Is the objective relevant or worthwhile to what the business or team needs to achieve?
- ✓ **Time-Bound:** Is there a focus-driving deadline related to the objective?

- **For more ideas and insights,** refer to the [Assess for Success playbook](#), which contains a detailed post-game plan for evaluating OE. It can also be used as a planning tool for heading into OE season!

*SMART goals were developed by George Doran, Arthur Miller and James Cunningham in their 1981 article "There's a S.M.A.R.T. way to write management goals and objectives."

Putting S.M.A.R.T. objectives into practice:

All too often, goals are set but then forgotten. S.M.A.R.T. objectives allow you to create, track and accomplish short- and long-term goals. At the same time, everyone from leadership to employees across your company can clearly see the steps you are taking to drive a better employee experience, which helps drive a more engaged culture.

Examples of S.M.A.R.T. objective setting:

Objective #1

- ✗ **NOT S.M.A.R.T.** Increase engagement with our wellbeing app.
- ✓ **S.M.A.R.T.** Increase the number of employees who adopt our wellbeing app by 20 percent by December 31. This will be done by incentivizing engagement and highlighting real-life employee stories of its benefit.

Objective #2:

- ✗ **NOT S.M.A.R.T.** Encourage the use of our mobile app for making benefits-related decisions, such as those related to care navigation.
- ✓ **S.M.A.R.T.** Grow the number of monthly users of our benefits mobile app by 25 percent within the next two quarters of this year by running a communications campaign via email.

Objective #3:

- ✗ **NOT S.M.A.R.T.** Conduct a more effective employee benefits survey program.
- ✓ **S.M.A.R.T.** Increase participation in our annual benefits survey to 80 percent of our workforce. This will be done by shifting the survey to a non-peak period, running for a two-week timeframe, and encouraging participation through a communications campaign as well as incentives based on department.



Create Your Benefits Strategy Plan

A **benefits strategy plan**, like this simple one, will help keep your HR team on track. It's also a great tool to share with team leaders and other stakeholders across the organization.

Employee Experience

Goal:

Gain a better understanding of our workforce and what matters to them.

Objective:

A more effective employee benefits survey program.

S.M.A.R.T. Objective:

Increase participation in our annual benefits survey to 80 percent of our workforce. This will be done by shifting the survey to a non-peak period, running for a two-week timeframe, and encouraging participation through a communications campaign as well as incentives based on department.

Key Steps:

- Outline an engaging communications campaign.
- Revamp survey questions.
- Determine incentives.

Enrollment & Utilization

Goal:

Ensure employees' health care and personal financial wellness goals are supported by benefits.

Objective:

Measurably greater engagement with our wellbeing app and financial coaching service.

S.M.A.R.T. Objective:

Increase awareness and boost utilization (to 60 percent of workforce) of our wellbeing and financial coaching services by running two, month-long campaigns focused on each topic, including emails, events and distribution of resources to our workforce.

Key Steps:

- Identify months to run the campaigns.
- Outline communications.
- Pull together resources from benefits partners.

Communication & Engagement

Goal:

Ensure a higher level of benefits understanding.

Objective:

More efficient servicing of employee benefits questions.

S.M.A.R.T. Objective:

Deliver 50 percent faster servicing of employee benefits questions by opening "HR office hours" for two time slots during the week, creating a dedicated email inbox for questions, and promoting the use of our dedicated customer service call center through our benefits partner.

Key Steps:

- Determine office hours and communicate to workforce.
- Set up a dedicated email inbox and communicate to workforce.
- Identify times across our annual communications calendar to promote the call center to the workforce.
- Revamp all benefits resources (portal, flyers, etc.) to make these options more prominent.

Administration

Goal:

Enable a more data-driven approach to benefits administration.

Objective:

Reporting process that identifies what's driving our health care costs.

S.M.A.R.T. Objective:

Identify health care cost risks and opportunities for savings by setting aside time for monthly reviews of our benefits data (i.e., medical claims, Rx claims, etc.).

Key Steps:

- Block off monthly review cycles.
- Involve our benefits partner in review process.
- Ensure all relevant data is accessible in our reporting tool.





Top 5 List

The Top 5 Ways to Connect Your Benefits Strategy to the Employee Experience

1 Create an employee value proposition that addresses unmet needs

Benefits are a powerful way to attract and retain talent and keep your employer brand on the competitive edge. Using feedback you've gathered helps you uncover your people's unique needs and expectations, alerting you to new benefits opportunities such as coverage for fertility treatments, financial coaching or virtual mental health services. When a benefits program meets their specific needs, it not only alleviates your employee's stressors, but also builds a strong EVP where employees feel seen and heard and has talent knocking on your door.

2 Engage employees through a variety of listening posts

Creating spaces where employees feel they can share their voice makes them feel valued, respected and cared-for. Plus, their needs evolve so keeping an ear to the ground can help you track changes that you can act on. Surveys are a straightforward way to find out more about what employees want and need, and you can also hold focus groups or garner feedback from Employee Resource Groups. Holding "office hours" is also a way to show your employees you have an open-door policy for feedback. Whatever methods are right for your organization, make sure to document feedback year-round so you can track patterns and introduce meaningful benefit changes.

3 Credit employees for making an impact

Close the loop so employees can see exactly how their benefits feedback helps shape benefit strategy and, in turn, drives desirable outcomes for employees and the company. You can do this by using real-life examples and sharing concrete results in your benefits communications. And keep your impact messaging front and center all year round to remind your workforce that they make a difference to organizational success.

4 Fill employees' benefit knowledge gaps

At least **88 percent of adults** living in the U.S. have health literacy inadequate to navigate the healthcare system and promote their wellbeing. Poor benefits comprehension can lead to suboptimal care choices, increased costs for you and your employees, and a negative view of your benefits program. One way to combat this is by proactively identifying knowledge gaps using employee surveys, benefits utilization trends and even medical claims history. You can use the insights to develop a plan to empower your workforce with additional support so they can avoid negative experiences like receiving surprise bills for out-of-network care. Consider delivering more benefits education sessions, arming them with decision support tools or providing materials they can access on-demand.

5 Provide a consistent digital experience

Full mobile enrollment and benefits management capabilities — optimized for both smartphones and tablets — bring the level of convenience that your employees have come to expect as modern-day consumer. And be sure to provide functionality around spending account data, claims data, decision support, care navigation and more.



Benefitfocus acts as an extension of your benefits team to help you achieve your goals, whether you're looking to increase engagement and satisfaction, empower your employees to choose the best plan for their needs or successfully introduce new benefits.

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