

Q1 2023

Employee Benefits Enrollment & Engagement Playbook

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

Benefitfocus[®]



Welcome!

It's time to Assess for Success and get your 2023 benefits year off to a great start!

Open enrollment season is over – and that means you can finally sit back and relax, right? Of course not. A new benefits year is beginning, and after a well-earned rest you're eager to implement programs and campaigns that keep benefits top-of-mind with your employees. To help you build out your winning strategies and meet (or even exceed!) your goals, we have created this playbook for you to use as a resource to:



Identify monthly observances, holidays, compliance deadlines and other 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 tried and 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 Q1 At-a-Glance Game Plan

Assess for Success

Open enrollment is an annual rite of passage for benefits professionals like you – a critical time to get employees and their families focused on the products and programs you offer to help protect their health and wellbeing. What's more, success with your overall employee benefits strategy depends on employees' ongoing engagement with their benefits, well beyond OE season.

You know that offering a comprehensive benefits package is more than the “right thing to do.” Now, more than ever, it's a competitive necessity – a powerful differentiator for top employers that want to demonstrate their commitment to caring for their workforce, strengthen their workforce culture and attract and retain their most valuable assets: their people.

It's worth “getting right” so that you can optimize your processes, plans and performance! If you take the time to Assess for Success at the beginning of the plan year, you'll be on your way to developing a winning strategy for the year ahead.

Objective:

Start an iterative approach to improving your company's open enrollment and ongoing benefits engagement process.



Steps:

Evaluate the performance of your most recent OE and related initiatives

Benchmark key metrics

Identify opportunities for improvement

Act on key insights



Resources:

Open enrollment data:

Administration

Communication and engagement

Enrollment and utilization

Employee experience

Assess for Success task force:

HR teammates

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

Benefit partners (i.e., TPAs, benefit and technology vendors)



Wins:

Plan ongoing and special initiatives to keep employees engaged with their benefits

Report on your successes (and identify areas that need more work)

Strengthen your benefit and communication plans for the upcoming year

Advocate for budget dollars for new technology, tools and resources

Prepare to collect more feedback from employees in the year ahead



Continuous improvement is better than delayed perfection.”

Mark Twain



Assess for Success

The secret to open enrollment success is conducting a comprehensive assessment of your most recent OE season so you can make ongoing improvements to your program. This involves evaluating the hard data at your disposal as well as the more qualitative and experience-based feedback your team (and employee base) can provide. You may not have had a robust reporting plan for 2023 open enrollment – and that’s OK. This is an iterative process. Analyze what you can and take note of what’s missing so you can prepare for next time. **Over the next few pages, explore the key areas to Assess for Success!**



What gets measured gets improved.”

Peter Drucker,
world-renowned
management
consultant



Administration

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

Assess...

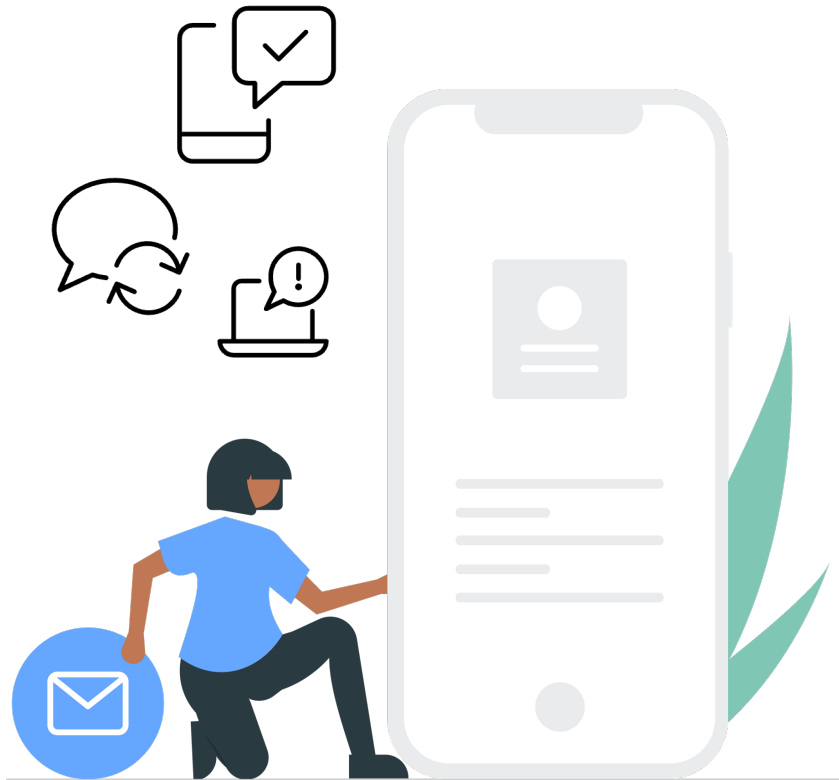
- **OE timing** – did we start and end on time? Were we able to make last-minute changes?
- **Planning process** – were the right people (including executives) engaged? Did the HR staff have adequate time to prepare and deploy education and communication materials?
- **Call center data** – what was the call volume and were issues resolved in a timely manner? Any trends emerging?
- **Eligibility and enrollment files** – were they delivered to carriers accurately and on time?

Success!

- **Make a list of the process elements that caused frustration, delay or errors** – and work with your benefits and technology vendors to address them.
- **Talk with your benefits, technology and internal IT partners** to make sure you’re collecting the right data and making it meaningful and actionable.
- **Partner with internal stakeholders**, including executives, in a commitment to prioritize benefits strategy and make the necessary improvements.

Communication & Engagement

Find out if your employee communications reached employees at the right time, in the right way with the right messages – and whether they did enough to drive the desired actions.



Assess...

- **Engagement metrics for email** – open rates, click rates and conversion rates.
- **Participation rates for live and virtual events** – sign-ups and attendance.
- **The readability and user-friendliness** of educational and communications content.

Success!

- **Determine if you're sharing compelling messages** through the right communication channels.
- **Find out if your benefits technology partners can help** you leverage untapped channels (e.g., text messages) and tools to reach employees with more personalized and targeted messages.
- **Make a case** for a longer (or shorter) pre-OE communications campaign.

More than one-half (**52 percent**) of organizations have an open enrollment period that lasts two weeks. Three- (**24 percent**) and four-week (**17 percent**) open enrollment periods are also common.

International Foundation of Employee Benefit Plans



Enrollment & Utilization

Uncover the trends in your hard data, sliced and diced by demographics (e.g., age, gender, income) for a full picture.

The most common open enrollment communication call to action (CTA) links are to:

- ✓ An enrollment portal
- ✓ PDFs of benefits guides and/or Summaries of Benefits Coverage (SBCs)
- ✓ Benefits webinar or seminar registration pages
- ✓ Decision-support tools
- ✓ HR and provider contact information
- ✓ Health or financial-wellness portals

Flimp Communications

Assess...

- **Major medical and supplemental plan enrollment and participation rates** – by plan type.
- **Selection of coverage tiers** (i.e., single, plus spouse, plus spouse and dependents) for all plan types.
- **HDHP, HSA and FSA metrics** – plan participation rates and account contributions.
- **Voluntary benefits** adoption and participation.
- **Complete vs. incomplete** enrollments.
- **Any associated claims data** – claims submitted, deductibles met, preventive care and ER visits.

Success!

- **Validate that the plan design decisions** you made are working and health plans are optimized.
- **Show that the cost control and benefits education programs** you invest in are changing employee behaviors.
- **Identify that your partners that assist with plan management** are effectively containing costs.



Employee Experience

Listen to employees via formal surveys, focus groups and quick polls as well as commentary shared more informally via emails and face-to-face communication. Note that the latter may come in early in the plan year, after employees have received their first paycheck and have started using their new benefits.

Among those who quit their job in 2021, **43 percent** said they did so because of **not having good benefits**.

Pew Research Center

Three in four (**75 percent**) organizations have their workers make open enrollment changes online/virtually, while **12 percent give their workers the choice** between making changes online/virtually or using hard copy documents.

International Foundation of Employee Benefit Plans

Assess...

- **Benefit offerings** – did they meet employees' needs and expectations?
- **Benefit education materials** – were they easy to find, consume and understand?
- **Benefit and OE communications** – were they sent through the right channels and were they clear and easy to understand and act on?
- **Enrollment process** – did employees find the process convenient and easy and feel like they had enough support?

Success!

- **Consider introducing** new benefits (including voluntary offerings), programs and resources that better reflect what your workforce needs.
- **Tweak your communications mix** for next OE season, which might include text messaging or a more robust internal social campaign.
- **Change your approach to benefits education** to include more year-round informational events or mobile experiences.



Top 5 List

How Benefits Professionals Can Improve Next Year's Open Enrollment Process – **Starting Today!**



Leverage data & analytics

Ask your internal IT team and vendor partners what benefits-related data can be collected and who can work with you to extract actionable insights. Also, start work on a plan to solicit feedback from employees on their benefit expectations and experiences to inform your benefits strategy and communications plan.



Remove the pain from administration

Be honest about your biggest pain points. Implementing new benefit options? Incomplete employee records? Configuring last-minute changes? An inability to track enrollment completions and plan elections in real time? Take them to your internal stakeholders and benefit partners and make the necessary changes to your process and tech.



Provide a modern enrollment experience

Rise to the expectations of today's employees – and beat the table stakes of top employers. Introduce a mobile app, gamify benefits education, personalize communications and make them actionable. Your workforce will thank you for it, and you just might have a more successful OE season to boot.



Improve benefits education

Simplify the complicated and crowded benefits landscape for employees by helping them understand, choose and use their benefits. Three ideas to consider: replace jargon with relatable terms, give employees access to a library of resources and enable them to estimate OOP costs for health plans based on actual claims.



Plan for an active (not passive) OE

Don't give employees an option to stay on autopilot with their benefits elections. Requiring them to review and update their benefits at least once a year (not including an official qualifying life event change) encourages them to consider how to align their benefits with their unique needs and current life situation.



Almost half (41 percent) of employees say that their top complaint about their employers' benefits programs is the communication is too infrequent.

Health Advocate



January 2023

Consider these opportunities to connect and engage with your workforce in January!

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 New Year's Day	2 New Year's Day (observed)	3	4 World Braille Day	5	6 National Technology Day	7
New Year's Resolution Week						
8	9 National Law Enforcement Appreciation Day National Clean Your Desk Day	10	11 National Take the Stairs Day	12 National Pharmacist Day	13	14
Home Office Safety and Security Week						
15 World Religion Day	16 Martin Luther King, Jr. Day	17	18	19 Get to Know Your Customer Day	20 International Day of Acceptance	21
Healthy Weight Week						
22 Chinese New Year	23	24 National Compliment Day	25 Better Business Communication Day	26	27	28 National Have Fun at Work Day
Tax Identity Theft Week						
29	30	31				

PLUS: National Thank You Month, National Mentoring Month, National Mental Wellness Month, National Blood Donor Month, Cervical Health Awareness Month, Thyroid Awareness Month

We're just getting started.
Print out this page and add your own ideas!



January Campaign Helper

New Year's Resolutions

According to a recent survey, **only 10 percent** of U.S. adults stick with their New Year's resolutions and **nearly half (47 percent)** of all resolutions are broken within the first month. You can help your workforce do better than that!

New Year's resolutions demonstrate people's desire and willingness to improve some aspect of their lives by "starting fresh" on January 1. Despite less-than-encouraging success rates – or maybe *because* of them – HR teams have the perfect opportunity to harness employees' enthusiasm for self-improvement and partner with them to achieve their goals.

Whether your employees want to get healthy, get organized, save money, grow professionally, learn something new, relax more or any number of possibilities...you're there to support them with your company's employee benefit programs.

Use these campaign recommendations to set off on the right path!



Objectives

You may want to increase enrollment in or utilization of specific benefit products, programs or resources that are related to the most common New Year's resolutions. For example:

- **Increase enrollment** in voluntary financial wellness products
- **Encourage participation** in your company's January wellness challenge
- **Boost utilization** of your health coaching or gym membership programs
- **Engage employees** in using career development resources

Benefits Enrollment & Engagement Ideas

The New Year's Resolutions theme is timely, relevant and easy to tie in with employee benefits. Promote products and resources that can help employees stick with their resolutions, such as:

- **Wellbeing app** – for staying healthy, body and mind
- **Identity theft protection** – for building digital security
- **529 college savings account program** – for family financial planning
- **Gym membership program** – for getting in shape and managing weight
- **EAP** – for reducing stress and reaching goals
- **Charitable donation matching program** – for helping others

Comms Mix:

Messaging:

Call-to-Action:

Sample New Year's Resolution Campaign Kick-off Copy:



Timeline





February 2023

Consider these opportunities to connect and engage with your workforce in February!



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 National Freedom Day	2 Groundhog Day	3 National Wear Red Day	4 World Cancer Day
5	6	7 National Black HIV/AIDS Awareness Day	8	9	10	11 Make a Friend Day
National Eating Disorders Awareness Week International Networking Week African Heritage and Health Week Congenital Heart Defect Awareness Week						
12	13 Clean Out Your Computer Day	14 Valentine's Day	15 President's Day Holiday	16	17 Random Acts of Kindness Day National Caregivers Day	18
19	20 Presidents' Day	21 Fat Tuesday	22 Ash Wednesday World Thinking Day	23	24	25
26	27	28 ACA deadline for filing paper Forms 1094-C and 1095-C with the IRS				

PLUS: American Heart Month, Black History Month, National Time Management Month, National Cancer Prevention Month, LGBTQ History Month

We're just getting started.
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February Campaign Helper

Heart Health

Heart disease is the leading cause of death for men, women and people of most ethnic groups in the United States – yet the CDC reports that **only 16 percent of employers provided information** (i.e., brochures, videos, posters, pamphlets and newsletters) to their employees last year on how to manage it! That’s surprising, considering that heart disease and strokes are “bad for business,” annually costing a per employee average of over a week in absences and **\$1,100 in lost productivity**.

February is American Heart Month, so employers around the country will be rolling out initiatives to raise awareness of heart disease and its risk factors and sharing tips on how to lead a heart-healthy lifestyle. Employers play a particularly powerful role in Americans’ health care, providing employees with a range of benefit programs that help them manage their health. Dedicating a month to educate your employees and engage them in heart-healthy activities is not only a great way to show you care, but also a way to positively impact the health of your workforce.

Use these campaign recommendations to set off on the right path!

Objectives

Heart health is a natural theme to tie in with employee benefits. Aside from generating goodwill and a healthier workforce, you may want to increase enrollment in or utilization of benefit products, programs or resources that support employees’ heart health and wellness. For example:

- **Increase downloads** of your company’s wellbeing app or participation in your February wellness challenge.
- **Boost utilization** of your health screening, health coaching or gym membership programs.
- **Raise awareness** of preventive services covered by your major medical plans.

Communications Plan:

Deploy a robust communications plan that reaches employees with actionable information throughout the month.

- **Comms Mix:** Connect with employees where they are already engaging, using a channel mix of email, text, corporate social media, postcards with QR codes, intranet, signage and company meetings.
- **Messaging:** Your campaign communications can raise awareness of heart disease and encourage employees to learn something new, attend a Heart Health event or schedule an appointment with their doctor.
- **Call-to-Action:** Engage with clear directives, such as “Visit your benefits portal,” “Join our Heart Health wellbeing challenge” or “Download this handy tip sheet.”



February Campaign Helper

Creative ways to get your employees engaged in heart health:

- ✓ Conduct a series of in-person or virtual educational events covering heart health basics and the employee benefits that support them
- ✓ Launch a weekly email series that shares heart health facts, resources and links to employee benefit programs
- ✓ Invite a speaker from your health plan or other benefit vendor to present at a heart healthy lunch-and-learn
- ✓ Launch a February wellbeing challenge focused on heart-healthy eating, moderate exercise and stress reduction
- ✓ Host weekly group stress-busting sessions featuring a mindfulness exercise or set of stretching exercises
- ✓ Distribute "{COMPANY NAME} Cares about Heart Health" t-shirts or stress balls
- ✓ Feature heart-healthy snacks in breakrooms and vending machines
- ✓ Invite your employees to join a heart health ERG or similar group on an organizational social media channel
- ✓ Share a different heart-healthy tip, recipe or stat every day over employee social channels
- ✓ Encourage managers to host walking meetings, when/if appropriate
- ✓ Host a National Wear Red Day®



Handy resources for you:

- [CDC's American Heart Month Toolkits](#)
- [American Heart Association](#)
- [American Heart Association's Go Red for Women®](#)
- [American Heart Association's Well-being Works Better resources for employers \(and employees\)](#)
- [National Heart, Blood, and Lung Institute resources](#)
- [WebMD Heart Disease Resource Center](#)



Handy resources for employees:

- [28 Days Towards a Healthy Heart \(NHBLI\)](#)
- [25 Ways To Take Part in Heart Month \(NHBLI\)](#)
- [Stress and Strain, Body and Brain \(AHA\)](#)
- [Common Heart Attack Warning Signs \(AHA\)](#)
- [10 Ways to Improve Your Heart Health Infographic \(AHA\)](#)
- [Managing My Blood Pressure \(CDC\)](#)
- [Blood Pressure 101 Quiz \(CDC\)](#)

[Get more ideas from the CDC!](#)



March 2023

Consider these opportunities to connect and engage with your workforce in March!

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 World Compliment Day	2 ACA deadline to furnish Form 1095-C to applicable employees	3 Employee Appreciation Day World Hearing Day	4
National Telecommuter Appreciation Week						
5	6 National Dentist Day	7	8 International Women's Day	9 World Kidney Day	10 National Pack Your Lunch Day	11
12	13	14 National Organize Your Home Office Day	15	16	17 St. Patrick's Day World Sleep Day	18 Global Recycling Day
National Sleep Awareness Week						
19	20 International Day of Happiness	21 World Social Work Day International Day for the Elimination of Racial Discrimination	22 World Water Day	23	24 International Day for Achievers	25
26 Purple Day for Epilepsy Awareness	27	28	29 National Vietnam War Veterans Day	30 National Doctor's Day	31 International Transgender Day of Visibility ACA deadline to e-file 1095-C and 1094-C Forms	

PLUS: Multiple Sclerosis Awareness Month, National Bleeding Disorders Awareness Month, National Kidney Month, National Traumatic Brain Injury Awareness Month, Women's History Month, American Red Cross Month, National Nutrition Month, Colorectal Cancer Awareness Month

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March Campaign Helper

Sleep Awareness

Adults between 18 and 64 need seven to nine hours of sleep per night – and almost one third of them get less than six hours per night. That means statistically speaking, one out of three of your employees is sleep-deficient and likely doesn't feel or perform their best while working.

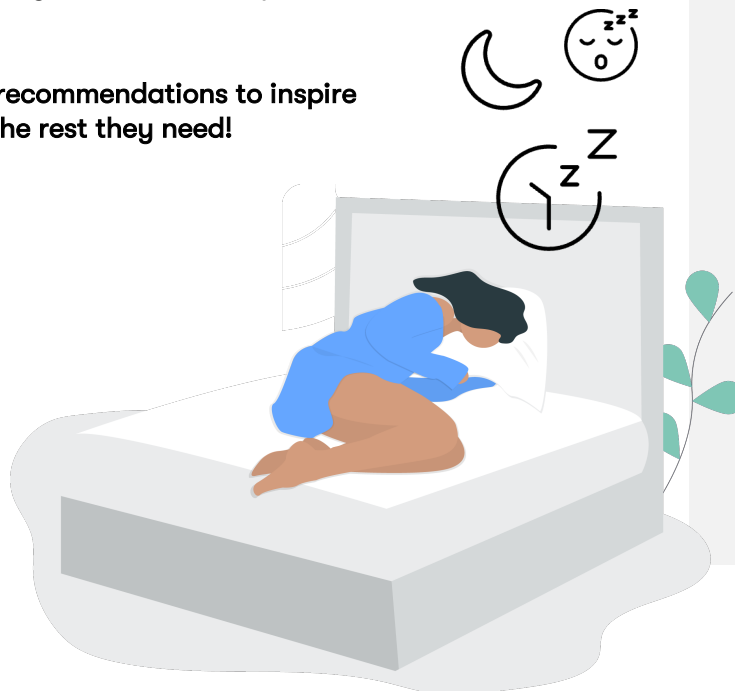
The link between sleep and job performance is well documented. People who are sleep deprived find it harder to maintain focus and are more likely to make errors. They're also more irritable and more vulnerable to stress. What's more, poor sleepers report more than double the rate of unplanned absenteeism and cost an estimated \$44 billion in lost productivity each year.

Thankfully, Sleep Awareness Week (with World Sleep Day) gives you the opportunity to celebrate sleep health with your workforce!

Use these campaign recommendations to inspire your employees get the rest they need!

pubmed.ncbi.nlm.nih.gov

Gallup



Objectives

Sleep is an integral part of a healthy lifestyle, and your employee benefits package surely offers a range of products and programs that support employees' health and wellness. A Sleep Awareness campaign can help raise awareness of these benefits and even boost participation in specific wellbeing initiatives aimed at helping employees manage stress and practice daily self-care.

For example:

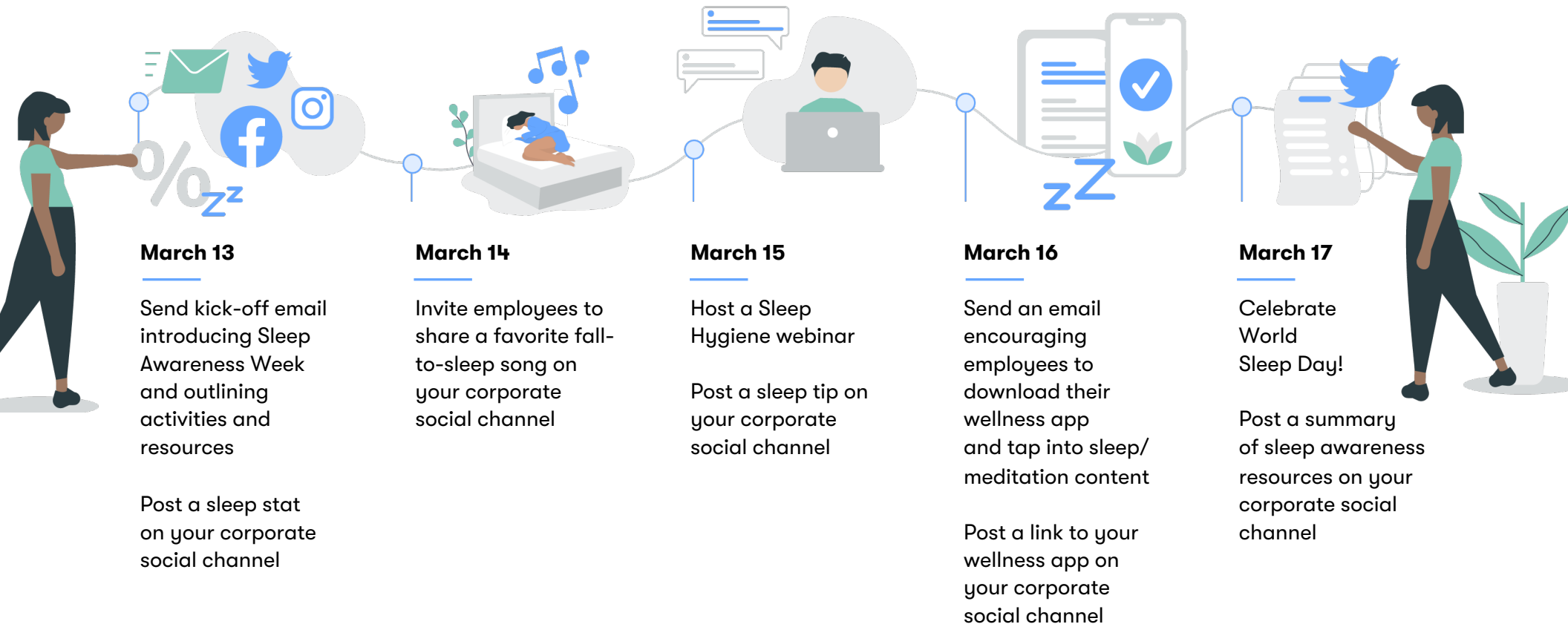
- **Increase downloads** of your company's wellbeing app
- **Encourage participation** in your March wellness challenge
- **Boost utilization** of your health coaching or gym membership programs

Handy Resources to Share with Your Employees:

- [Health Sleep Starts Before You Hit the Sheets](#)
- [Not Sleeping Well? It Might Be Time to See a Healthcare Provider](#)
- [Sleep and Sleep Disorders](#)
- [Infographic: Getting a Good Night's Sleep](#)
- [Video: 10 Commandments of Health Sleep You Must Follow for a Good Night's Rest](#)

Communications Plan and Timeline

As a week-long campaign, you have five work days to engage employees in activities and resources that can make a life-long impact on the way they feel and perform. Consider this timeline of activities:



For more tips and ideas
around-the-clock, visit us at
Benefitfocus.com/resources

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