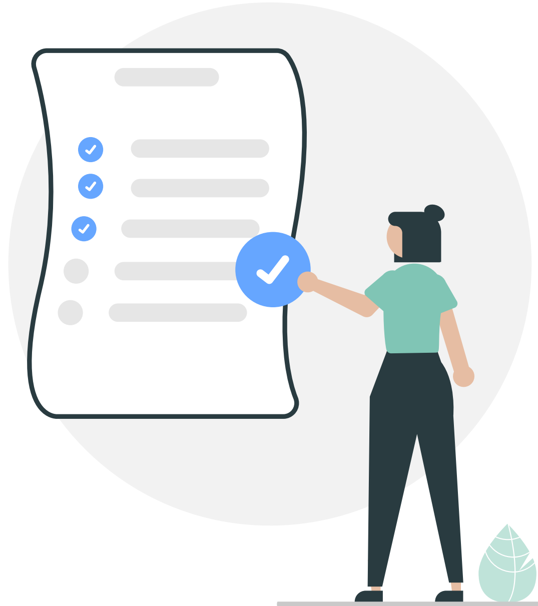
Annual Open Enrollment Goal-Setting Checklist



Setting goals for your annual benefits open enrollment (OE) season is one of the most important things you can do to prepare your team – and your workforce – for success. After all, OE is prime time for getting employees and their families focused on the products and programs you offer to help protect their health and wellbeing.

Benefits management is hard work that involves a lot of resources, especially heading into OE. But making an effort to define key objectives and determine how to measure success is intended to help you to optimize your processes, plans and performance over time – and help focus some of your energies in the benefits year ahead.

Use this checklist as a tool to help ideate and refine your goals for OE. It may even reveal opportunities for improvements you can make before the next enrollment window opens. **Let's get started!**

What are your goals for this year's OE season?

Do the goals on your list align with company goals or broader HR goals? These might include:

- ☐ Building a wellbeing-focused workforce culture
- ☐ Attracting and retaining top talent
- ☐ Becoming more data-driven
- ☐ Supporting employees' mental health
- ☐ Enhancing benefits education initiatives
- ☐ Improving health care affordability
- ☐ ______________________________
- ☐ ______________________________

Do you have goals and measurable objectives in these 4 key assessment areas?

☐ **Administration** – goals related to the efficiency and quality of your OE processes, both manual and automated, including those related to your HR technology and benefits partners. Objectives might include:

- Have ____ % of OE campaign employee communications approved ____ weeks before OE kickoff.
- Address ____ % of call center questions within ____ minutes.
- Deliver ____ % of eligibility and enrollment files to carriers accurately and on time.

☐ **Employee Communications & Engagement** – goals related to reaching employees at the right time, in the right way with the right messages to drive the desired actions. Objectives might include:

- Achieve email open rates of ____ %.
- Achieve benefits webinar participation rates of ____ %.
- Increase use of decision support tool from ____ % to ____ %.

☐ **Enrollment & Utilization** – goals related to the benefits employees sign up for and how they access and use them. Objectives might include:

- Increase enrollment in HDHP plan from ____ % to ____ %.
- Increase activation rate of company wellbeing app from ____ % to ____ %.
- Decrease rollover enrollments from ____ % to ____ %.

☐ **Employee Experience** – goals related to employees' perception of their benefits and employer brand, benefits enrollment process and workforce culture. Objectives might include:

- At least ____ % of employees agree that the benefits enrollment process was "easy" or "very easy."
- Increase the percentage of employees who indicate that benefits education materials were easy to share with partners/household decision-makers to ____ %.
- Achieve a ____ % increase in employees who report feeling "confident" or "very confident" in their health plan selection.

Are your goals SMART*?

For example, you may want to see an increase in the number of employees who sign up for and attend your OE benefits education webinars.

- ☐ **S**pecific – Direct, clear and meaningful (e.g., Have at least 85 percent workforce participation)
- ☐ **M**easurable – Quantifiable and trackable (e.g., maintain a spreadsheet to track activity)
- ☐ **A**ctionable – There's action you can take to achieve the goal (e.g., multi-channel communications campaign)
- ☐ **R**elevant – Aligns with company goals and is worthwhile (e.g., enhance benefits education initiatives)
- ☐ **T**ime-Bound – Has a focus-driving deadline (e.g., OE season webinar schedule)

Use this space to add or refine goals.

Ready for Next Steps?

Once your goals are defined – and you have objectives and success metrics in place – your next step is to assign tactics to each goal and put processes in place to track your progress, report on activity, etc.

Don't miss 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."

CN4618660 _0727