



Benefitfocus[®]

Open Enrollment Survey Playbook

How to make the most
of employee feedback to
improve their benefits open
enrollment experience



Open enrollment surveys support your company's benefits program by:



Providing insights into your employees' benefit needs and expectations.



Revealing employees' **perceptions** of your benefits offerings, communications and technology.



Arming your benefits team with **actionable data** you can use to evaluate your programs and budget.





Dear Benefits Leader,

Your team works practically year-round to produce the biggest benefits show of the year: Open Enrollment (OE). So cue the applause – and the employee participation and engagement!

Of course, once the curtain falls on the enrollment window, the show's not over. Your team needs to evaluate the effectiveness of their hard work with the goal of improving the employees' benefits experience for an even better Open Enrollment season next year.

The Power of the OE Survey

Asking your benefits-eligible employees to take a survey – right after OE, when benefits are still top-of-mind – is a great way to measure success and inspire future changes.

In addition to revealing employee satisfaction with your organization's benefits offerings, resources, communications and the enrollment process, the results can help uncover opportunities for program enhancements. In fact, you can use the survey data in your business case for getting budget to adopt new benefits, expand vendor partnerships or invest in new technology!

You can use this guide to help boost your employee benefits strategy with a well-crafted OE survey. In addition to lots of example survey questions, you'll find:

- ✓ An interactive worksheet to get you started
- ✓ Ideas for encouraging employees to participate in your survey
- ✓ Tips for structuring an effective survey
- ✓ And much more!

Ready to go?!



3 Questions (for you) to Get Started

The objective of your OE survey is to gather information you can use to better understand your employees and what's important to them – so you can deliver a better benefits program. A great first step is to take a few moments to consider your plan with these questions:

1. Is your survey strategic?

An effective OE survey helps drive, inform and support your success. While this guide can help get you started with the basics, keep in mind that an OE survey is a project that requires time and talent to get the job done well. (If that means starting small this year, that's ok!)

What matters is that you're incorporating employee feedback into your OE strategy so it's more employee-focused, optimized for better performance and helps you meet organizational goals.

How can your OE survey support your benefits strategy?





2. Is your survey focused?

A well-designed OE survey will help prevent respondent survey fatigue and make next steps easier for your benefits team. When you're clear about what you want to learn from your survey, you can decide which topics and questions "make the cut."

Are you curious about what employees think of their benefits offerings so you can update your benefits mix?

Do you want to know how easy (or challenging) it was for employees to navigate the enrollment process so you can consider upgrading your technology?

Maybe you want feedback you can use to improve your benefits education or communication initiatives?

All of the above?

While all insights can be valuable, knowing what you need to prioritize – and what you can realistically take action on – can help simplify both the survey and the follow-up.

What types of targeted insights do you want your survey to reveal?





3. Is your survey actionable?

An impactful OE survey will result in program improvements. Gallup's Implementing Workplace Survey Best Practices states "One of the fastest ways to destroy workplace morale is to ask employees their opinions about it, then ignore their answers." The same can be said for asking employees about their OE experiences and then not taking action on the insights.

It's critical that if you're going to do a survey, your intention is to act on the results – and to communicate that intention to employees. Demonstrating the ways their feedback can lead to changes in your benefits offerings and programs can serve as an important trust-builder with your workforce. And making those changes? That's where the rubber meets the road.

What actions might you expect to take as a result of evaluating your OE survey responses?





Example Benefits Questions

How satisfied are you with this year's benefits options?

Possible scale to use:



Rank the following benefits from 1-10 where 1 is the most important and 10 is the least important.

Possible answers might include:

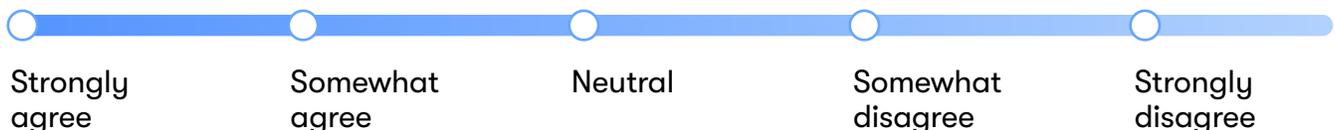
- Major Medical Insurance
- Dental Insurance
- Vision Coverage
- Accident Insurance
- Critical Illness Insurance
- Hospital Indemnity Insurance
- Identity Theft Protection
- Legal Insurance
- Pet insurance
- 401(k) Program

This year's benefit options help address the following wellbeing goals.

Possible wellbeing goals might include:

- Improve nutrition
- Improve physical health and performance
- Reduce stress
- Develop better sleep habits
- Improve personal financial habits (e.g., budgeting, saving for retirement)
- Better manage a chronic health condition
- Prioritize self-care

Possible scale to use:



What do you value most about your employee benefits program?

Open-ended question.

Your employee benefits program makes this organization a desirable place to work.

Possible scale to use:



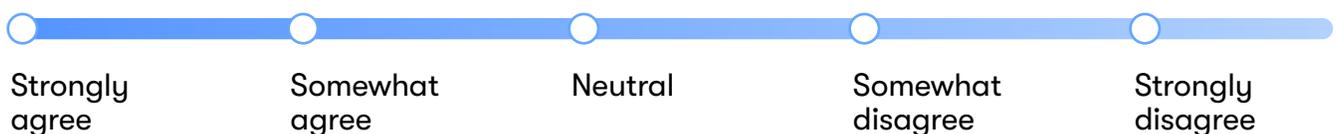
Your employee benefits meet your (and/or your family's) needs.

Possible scale to use:



Your employee benefits help you balance life and work.

Possible scale to use:



Are there other types of coverage or specific benefits you'd like the company to consider offering next year?

Open-ended question.



Example Enrollment Experience Questions

How satisfied are you with your overall benefits enrollment experience?

Possible scale to use:



It was easy to enroll in benefits using our enrollment platform.

Possible scale to use:



The benefits enrollment process was personalized to your specific needs.

Possible scale to use:



It was easy to involve your spouse/partner in benefits enrollment decisions.

Possible scale to use:



What could make the enrollment process better?

Open-ended question.



Example Benefits Education and Communication Questions

**What was your preferred way of receiving OE communication from HR?
(Select up to two).**

Possible answers might include:

- Email
- Text messaging
- Announcements on company website/intranet
- Corporate social media channel(s)
- Direct mail to your home address
- Office signage
- Enrollment platform
- Other

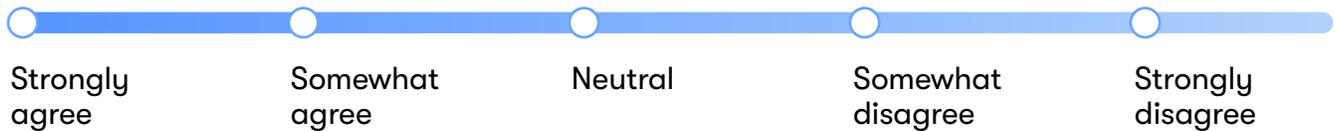
OE communications were easy to understand.

Possible scale to use:



Were you provided with adequate information about your benefits?

Possible scale to use:



Were OE benefit resources provided to you in a timely manner?.

Possible scale to use:





**What helped you the most when selecting your medical plan for this OE?
(Select up to two).**

Possible answers might include:

- Benefits guide
- Plan comparison chart
- Decision support tool
- Company Intranet
- HR team
- Spouse
- Previous claims data
- Other

Considering the tools and resources you were provided to help make your benefit elections this OE, rank the following from 1-5 where 1 was the most helpful and 5 was the least helpful.

Possible answers might include:

- Decision support tool
- Benefits webinar
- Benefits guide
- Company intranet
- HR team

**How did you prefer to consume benefits education information?
(Select up to two).**

Possible answers might include:

- Written/printed materials
- Company website/intranet
- Enrollment tool/app
- Presentations/webinars
- Videos
- Live meetings
- Other

On a scale from 1-9, how well do you understand your benefits?

What do you not understand about your benefits?

Open-ended question.

Which benefits do you wish you knew more about?

Open-ended question.



Is there anything we can do differently to help you better understand your benefits?

Open-ended question.

Example Demographic Questions

What age group are you in?

Possible answers might include:

- Under 25
- 26-34
- 35-44
- 45-54
- 55-64
- 65 or older

Which life stage do you identify with? (Select all that apply.)

Possible answers might include:

- No dependents
- Planning or building a family
- Raising children
- Caring for an adult loved one
- Planning for retirement
- Other

How would you describe your role?

Possible answers might include:

- Individual contributor
- People manager
- Division leader
- Executive

How long have you worked at this organization?

Possible answers might include:

- Less than 1 year
- 1-3 years
- 4-5 years
- 6-10 years
- 11+ years



Ideas for Getting Employees to Participate in Your OE Surveys

-  **Ensure anonymity.** If your employees are required to identify themselves, they may not feel comfortable providing honest answers.
-  **Keep it short and sweet.** Less is more when you limit the number of questions and avoid too many open-ended questions. You may want to tell them up-front that the survey will take less than 5 minutes to complete, for example.
-  **Share the purpose.** Let employees know their feedback is valuable and will help improve their benefits program. Indicate when they may hear back from your team with findings.
-  **Make it mobile friendly.** It may be more convenient for employees to take the survey on their smart phones while waiting for their lunch or while browsing on their tablet at night.
-  **Offer an incentive.** Motivate employees to respond by holding a drawing among participants, awarding prizes that are likely to have mass appeal, like gift cards. (Be sure to separate the personal information needed for reward from the survey responses.)

3 Tips to Structure Your OE Survey for Success

1 Use multiple formats for questions. Keep employees engaged with a variety of formats, such as multiple-choice and check boxes. You can also include questions that require a rating or that use a scale. Asking respondents to rank a series of options is yet another way to mix it up – and to help ensure you get the insights you need.

2 Include open-ended questions. Get more detail and even fresh perspectives by asking employees to provide answers in their own words. With free-form responses, employees don't simply provide feedback: they can also be part of the solution and save your benefits team from some late-night brainstorming sessions. Note that too many open-ended questions can contribute to survey fatigue and may impact completion rates.

3 Determine the need for multiple surveys. If keeping your OE survey short and sweet is challenging, consider a different approach. For example, you could have...

- ✓ One survey to better understand the success of your communications and another survey to get employees feedback on their actual benefits.
- ✓ A short pulse survey to get a quick idea of your employees' overall satisfaction and mix it with an in-depth survey another time.
- ✓ A progressive survey that puts the most important questions first. Once these questions are complete, employees can opt in to answer further, more detailed questions.

Pro Tip

For greater impact, make your OE survey part of a larger employee feedback initiative. Download the [Get to Know Your People Better Playbook](#) to learn more!



Inspiring Ways to Leverage Your Results



Review results with curiosity. Dedicate ample time to going over the survey results with your benefits team – and keep an open mind. What surprised you? Anything raise a red flag? Did any cool ideas emerge? Summarize your findings and discuss next steps. And decide when you'll communicate your action plan with employees before the next OE.



Acknowledge complaints. If you notice there's a consistent complaint in your survey responses, demonstrate a growth mindset. Let employees know you've heard their feedback and are working on a solution to improve their experience. Dive deeper. If there's more you need to know about or simply want to explore a topic further, create another survey, hold employee focus groups and/or ask managers to get feedback from their teams.



Combine survey data with other metrics. Enhance your survey data by combining your findings with other OE metrics such as enrollment numbers, education session participation rates, email campaign performance and more. Download the [Assess for Success Playbook](#) to learn more!



Measure your success over time. When surveying your employees after each OE period, you do more than plan for your next campaign. You're collecting data that benchmarks your success over time and informs strategic decisions.

Next Steps

Explore benefitfocus.com/resources for more insights and tools to help inspire your benefits team.

Book a demo to experience Benefitfocus in action – and learn how we can help radically simplify benefits for your organization.

The logo for Benefitfocus, featuring the word "Benefitfocus" in a bold, black, sans-serif font. A small blue dot is positioned above the letter "i". A registered trademark symbol (®) is located to the upper right of the word. The logo is centered on a yellow background that has a blue geometric shape on the left side.

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