

Open Enrollment Planning Checklist



Proper planning for open enrollment can set you up for success. Ultimately, it helps you determine what you'd like to achieve and set the steps to get there. Use this checklist as a guide to some of the most important aspects of the open enrollment planning process.



Assessment & Metrics

Assess where your benefits program stands today

Look at benefit enrollment and utilization reports along with claims data analysis, employee demographics and company culture.

Get employee feedback

Keep a pulse on what employees value by launching a total well-being survey that asks them to rate their current benefits, share their well-being goals, relay their preferred communication methods and provide recommendations on future offerings.

Conduct a full gap analysis

Complete a gap analysis using your employee survey data and industry benchmarking reports to identify areas where you may be missing important opportunities in your benefits offering and/or how you can improve communications around benefits already available.

Collect key stakeholder objectives

Share your assessments and gap analysis with your executive team, gather their overall objectives for the company's benefits program and determine financial goals within health care spend.

Create your success metrics

Utilizing all of the data you collected from assessments, surveys and key leadership, determine the success metrics for your upcoming open enrollment and build a timeline to track each metric.



Branding & Communications

Design your benefits open enrollment theme

Develop a theme to rally around and give your benefits brand a spark to make communication more engaging.

Build your brand

Develop supporting assets such as an open enrollment logo, print materials, videos and testimonials to make your open enrollment campaign more visible.

Set up listening posts

Conduct a campaign to collect employee testimonials and/or stories of positive experiences utilizing certain benefits your company offers. Host employee focus groups to collect feedback on benefit communications.

**Stay on track with timelines**

Schedule regular check-in meetings on communication and benefit configuration timelines with important target dates to keep all of the moving pieces aligned.

**Revamp your benefits hub**

Make sure your benefits website is ready to go for open enrollment kick-off, reflecting your unique brand and serving as a single source for all benefits information.



Strategy, Alignment & Action

**Schedule your open enrollment launch date**

Mark your open enrollment date on the calendar early in the year in order to build a comprehensive plan of action. Communicate your open enrollment dates to your employees at least a month in advance.

**Build an open enrollment team**

Bring together a team of individuals representing a variety of voices across your organization, and establish a regular cadence of meetings to stay updated on tasks and identify creative solutions to any barriers you encounter. Assign team members as owners of key success metrics.

**Implement an enhanced enrollment experience**

Optimize benefits enrollment for your employees by introducing new tools into the enrollment experience such as mobile app, videos and data-driven decision support.

**Share your vision**

Create the story of your open enrollment and communicate regularly with executive leadership to provide updates on your objectives and key results.

Get more open enrollment planning resources at: resources.benefitfocus.com/open-enrollment.