

# Open Enrollment Planning: A Guide for HR and Benefits Teams

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For many organizations, open enrollment is almost over. And while your HR team may be looking forward to a break from an intensive planning process, you're likely to face many of the same challenges again next year. How did your solutions work? More importantly, is there a way to preempt or avoid these challenges? Next year's open enrollment planning starts now.

Think of open enrollment planning as an ongoing process with times of high and low intensity. The closer you get to your deadline, the higher the intensity. But if you find the planning process more stressful than not, it's time to start earlier.

## **Evaluate Your Process and Identify Areas of Improvement**

Creating an ongoing process will help your HR team focus on creating an open enrollment process that runs smoothly and achieves your goals. Start by evaluating what worked and what didn't on two fronts. First, conduct a self-evaluation. Did you have enough time and a big enough budget? Was there too much manual work? No consistent communication plan?

Next, gather employee feedback. Survey your employees to identify which areas might need improving for different demographics and groups of employees. How easy was open enrollment for remote employees? How about your younger employees—do you need to bolster your communications and educational materials? Measure engagement (or start planning the tools needed to do this) to identify which employee segments responded best and which segments need a different approach.

## **Set Goals and Map Out Your Plan**

Once you evaluate areas for improvement, set goals for your organization. Consider these common challenges and their solutions:

### **1. Budgeting and Streamlining Processes**

Preparing and running open enrollment requires a tremendous amount of effort, and not all organizations have separate budgets set aside for it. Consider discussing an open enrollment budget. When pitching the idea, emphasize the value of establishing repeatable processes and the important role open enrollment plays in employee engagement. Either way, maximizing your resources and looking for ways to save time and money should be a key part of your planning process.

Clarify expectations with your current vendors and business partners and ask how they can support your HR team during open enrollment. Discuss your goals and challenges with your benefits consultant as well—they should be able to help you cut down on manual work, make your processes more repeatable and efficient, or maximize your available resources and systems.

### **2. Educating on New or Changing Benefits**

Over the past few years, more employers have been offering new benefits, which brings a new challenge of introducing these benefits and what they mean to your employees. For new offerings or changes to your benefits, consider creating a new benefits guide and corresponding, easy-to-digest educational materials.

Benefits can be confusing, especially with the growing array of choices, and insurance jargon could overwhelm employees. Make sure your materials are easy to understand and be sure to send out multiple communications to your employees stating what your new offerings are, how to use them and how they can get started.

### 3. *Engaging and Communicating with Employee Groups*

If employees don't understand their options or how to make their elections, participation and utilization will suffer. In addition to creating increased work for HR teams, this could also hurt productivity and retention efforts.

Engaging each diverse group of your employees (diverse geographically, demographically, technologically, etc.) in open enrollment requires different approaches and multiple channels of information. Get to know your audiences and how they consume information so you can tailor your communications and successfully engage each employee group.

Communicate early and often and resist putting all the details upfront so that your initial communications are simple and concise. By continually communicating with employees throughout the year, or at least a few months ahead of next year's plan changes, you can help them make informed decisions during open enrollment. Building a full campaign for open enrollment takes time, so start by adding to the framework you currently have.

#### **Set Deadlines and Start Now**

Before the end of the year, assign deadlines to your goals. Decide what you can start planning now, six months out, and two months out from open enrollment. And don't forget that your benefits consultant can help you improve your processes and evaluate your systems, tools, budget and employee feedback.

With a plan in place and a short list of goals, your HR team should be able to face any challenges, get better results and weather the open enrollment storm for next year.

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