

Debriefing the Open Enrollment Process: A 5-Step Guide for HR Professionals

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As the benefits season ends for many companies, it's essential for HR professionals to conduct a thorough debriefing on the open enrollment process. This step helps identify what worked well, what can be improved, and provides valuable insights to ensure that future enrollment cycles run smoothly. Here are the five key steps to debrief effectively:

1. Review Enrollment Metrics

Begin by reviewing the quantitative data from the open enrollment period. You should be able to get this information from your broker. Look at participation rates, plan selections, and any changes in employee coverage. This data will help you identify trends, such as which benefits employees are choosing most often, and whether the communication strategy reached the right people.

Questions to ask:

- What percentage of employees enrolled in each plan?
- Were there any noticeable shifts in coverage choices compared to previous years?
- Did any benefits plans experience low enrollment rates? If so, why?

2. Gather Feedback from Employees

Solicit direct feedback from employees who participated in the open enrollment process. This can be done through surveys, focus groups, or one-on-one interviews. Ask them about their experience with the enrollment system, the clarity of the information provided, and whether they encountered any difficulties.

Survey questions to consider:

- Was the enrollment platform user-friendly?
- Did employees have enough information to make informed decisions?
- Were the communication materials helpful and easy to understand?

3. Analyze Internal Communication Efforts

Effective communication is key to a successful open enrollment. Review how well your HR team communicated the available benefits, deadlines, and key changes. Evaluate the methods used, such as email, webinars, in-person meetings, or digital brochures. Your benefits broker should recommend effective ways to reach your employees.

Consider the following:

- Did the timing of communications align with employees' decision-making needs?
- Was the messaging clear and consistent across different platforms?
- Were employees given ample time to ask questions and make decisions?

4. Assess the Enrollment Process

Take a deep dive into the procedural side of open enrollment. Did the systems used to manage employee choices function smoothly? Were there technical issues with the enrollment platform or any administrative bottlenecks? Your benefits broker should have a smooth process to reduce employee frustration and ensure that no one misses out on important benefits.

Key considerations:

- Were employees able to easily navigate the enrollment system?
- Were there any glitches or delays that hindered the process?
- Did HR staff experience any challenges or inefficiencies while processing enrollments?

5. Document Insights and Identify Areas for Improvement

Once you've reviewed the metrics, feedback and processes, document the insights and identify areas for improvement. This information will be invaluable for planning next year's open enrollment. For example, if employees felt overwhelmed by the number of plan options, consider simplifying communications or offering clearer comparisons.

Actionable next steps:

- Identify pain points and develop strategies with your benefits broker to address them.
- Explore opportunities to improve employee education about benefits options.
- Plan ahead for next year's open enrollment schedule and communication plan.

Conclusion

Debriefing the open enrollment process allows HR teams to refine their approach and enhance future experiences for employees. By gathering data, seeking feedback, and analyzing processes, you ensure that your next open enrollment will be even more efficient, effective and employee-friendly. ■

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