

# How to have a successful virtual OE experience

## How to guide

**Open enrollment is one of the busiest times of the year for Human Resources professionals.**

They cover everything from navigating updated pricing with medical, dental and vision providers to compiling benefits information to figuring out how to make sure employees understand their benefit options. Sounds easy, right?

That's why we've put together this how-to guide to help you hold a successful open enrollment. This guide will help you effectively communicate benefits information to your employees and give you some tips and tricks to use along the way.



## 1. Keep It Short and Simple

With the clutter of today's world, it is important to keep messages short and to the point. Make it easy for an employee to quickly read an email and have a clear call to action (like enrolling in their benefits!).

### Email Formatting Tips:

- Use short, bold headlines to draw attention and make it easy to scan.
- Use bulleted lists in groups of 3 or 5.
- Explain plan benefits by comparing them to everyday examples.



## 2. Provide One Resource for All Information

People like having time to review information when it is convenient for them. Publish your benefits information to an intranet site so it can be accessed 24/7. Provide the information in a variety of different ways, such as PDFs that can be downloaded or printed, short videos or demos, and provide contact information if they have additional questions. If possible, build a page dedicated solely to your benefits information.

## 3. Communicate Early

Don't wait until your active open enrollment window to start communicating benefits information. Plan to start sending emails and even short recorded videos (use any existing virtual meeting technology like Zoom or WebEx) to your employees at least a month in advance and send out a regular consistent message each week.

**Link to helpful resources or directly to your intranet or HRIS platform with more on their benefits information that they can view when it is most convenient for them.**

## 4. Remind Employees of Tools and Resources

Once enrolled, the best way for an employee to get the most out of their benefits is to log in to their online account and leverage their payment debit card at the point of purchase. They can review account balances, review any outstanding tasks and view messages from their message center all from their online account.

## 5. Don't Stop

Once open enrollment is over, don't stop communicating. Make benefits education an ongoing part of your HR communications strategy. By keeping employee benefits top of mind throughout the year, you're building habits that will hopefully boost participation in future plan years, which helps you and your employees save more money.