

BEST

open enrollment

EVER

How to create an open enrollment experience that will have EVERYONE talking about the experience and saying "THANK YOU"

Perception



Believing that ‘good benefits’ will help attract and retain ‘good employees’

Reality

The benefits are only as good as EACH EMPLOYEE believes & understands them to be

Harsh Reality

Most open enrollments and benefit education meetings are boring, confusing and delivered in a way that makes employees stay on Tik-Tok or IG instead of choosing the very thing that is supposed to be such a “benefit”.

Solution

Fix It.



START HERE

Dream a minute...

Silly but powerful. Don't skip this step. Dream.

If you could design the 'perfect' open enrollment, what would it look like? After the open enrollment meetings, what would be the reaction of your employees? What would the owners say about it? How would this affect recruiting efforts?



On the next two pages, use the space provided to jot down ideas of how you can implement each step in your own organization.



5 STEPS TO CREATING THE BEST OPEN ENROLLMENT EXPERIENCE



1. Finalize the plan design

Know what is being offered, what the company is contributing and why those products, carriers, and cost shares.

Ensure your plan design & budget support the objective you have for offering benefits in the first place.



2. Simple over Complex

Consider ditching the benefit booklets and build a workbook instead.

Our Foundation, Wall, Roof concept is the easiest we've found to date on helping employees truly understand their benefits.

- a. Foundation = disability / life type of products
- b. Walls = dental, vision, similar type products
- c. Roof = major medical plan options



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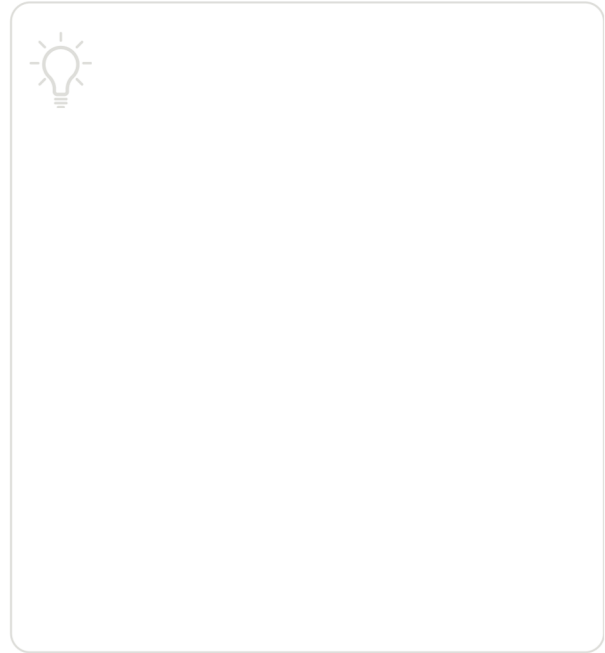
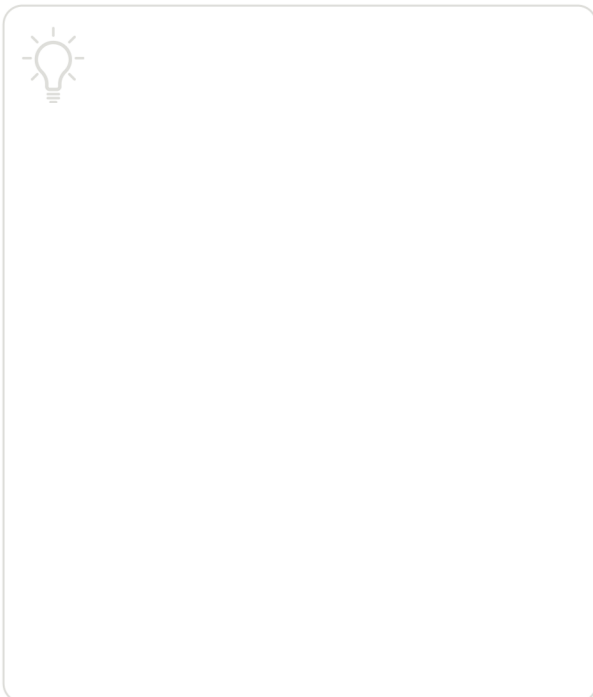


3. The Expert

Have your broker or a neutral 3rd party deliver the majority of the education meeting.

Done professionally and properly they will be able to position the company as the hero of the story and have the employees see the value of the benefits package.

This does assume a properly built and funded benefits package.



4. Clear Enrollment

Don't overload employees with tons of paperwork, brochures, packets, and signatures to return.

Consider a simple enrollment platform that will allow them to enroll using the same process you did for the education (EX: FWR)



5 STEPS TO CREATING THE BEST OPEN ENROLLMENT EXPERIENCE



5. Adult Learning & Atmosphere

It's not just about the plan design or even the education. It's about the entire experience. Music, lotto tickets, gift cards - whatever it takes to match the attitude and culture of your company can shine through at open enrollment. Remember, engage at least 2 adult learning techniques.

1. Touch - pen and paper. Workbook. Fill in the blanks. SIMPLE format.
2. Sight - use the employees to educate the employees. Ex: Jack & Jill
3. Hearing - no more boring, monotone presentations packed with insurance jargon.
4. Smell - no. just no. Unless it's coffee and cake. Then maybe.
5. Taste - only yummy food please. 🍷

6. If there was a 6th step it would be

Meet with Emily / The Benefit Doctor. We do this stuff all day, every day. We love it, we're the best at it and we LOVE serving businesses that truly care about their employees and want to take care of them.

Schedule a free, no obligation video chat by scanning the QR Code.

