

Create the **Open Enrollment** of Your *Dreams*

Tips to make open enrollment easy, engaging and (dare we say it?) fun!

Follow these simple steps and O and E will be your new favorite vowels!

Communicate!

Treat open enrollment *communications* like a **full-scale** marketing campaign.

✉ **Hit** them with everything you've got: emails, *live* meetings, social media, carrier pigeons, sky writing; anything that gets employees' *attention*.

Keep *communication* consistent and use a central theme. Remember to include details on OE **deadlines** and a clear call to action.

Educate!

Benefits are a big expense for most families, yet many people know very little about their plans and benefits. You can change that!

A picture says a thousand words, so a video must say a million! Educate employees with short videos on widely-used but often misunderstood benefits terms (check out plansource.com/videos).

Hold a Benefits fair for your employees, and include representatives from your broker who can help you answer questions. You may even consider offering one-on-one consultations.

Activate!

Rolling over is a great trick for a dog, but not a good enrollment strategy. Make your enrollment active and ensure that employees have what they need to make informed choices.

Offer live support from licensed insurance professionals as employees are making their selections.

Guide them through the shopping and enrollment process. Use software that makes personalized plan recommendations and allows employees to compare plans and link to educational tools. We might (cough) be able to recommend a good one...

Calibrate!

Measure enrollment numbers and calibrate as needed. Emails not doing the trick? Try more face-to-face or send texts via a Mobile App.

Celebrate!

OE was a success! Pat yourself on the back and grab a cold one. You deserve it.

PLANSOURCE®

One Source. Many Benefits.