



Celebrate Open Enrollment Webinar

Best practices and practical tools for OE communications



We will be live-tweeting. Contribute to the conversation! #CelebrateOE



Will the webinar be recorded?

Yes!

**(We will send you a link to the recording
after the webinar).**



We will be live-tweeting. Contribute to the conversation! [#CelebrateOE](#)



Will the slides be available?

Yes!

(We will send you a link to a PDF after the webinar).



We will be live-tweeting. Contribute to the conversation! [#CelebrateOE](#)



Agenda

Great Experiences Start with a Plan

Start Strong

Invite Influencers to Share

How to Make it Fun

What People Will Remember

Q&A





Type your question into
the "Questions" panel

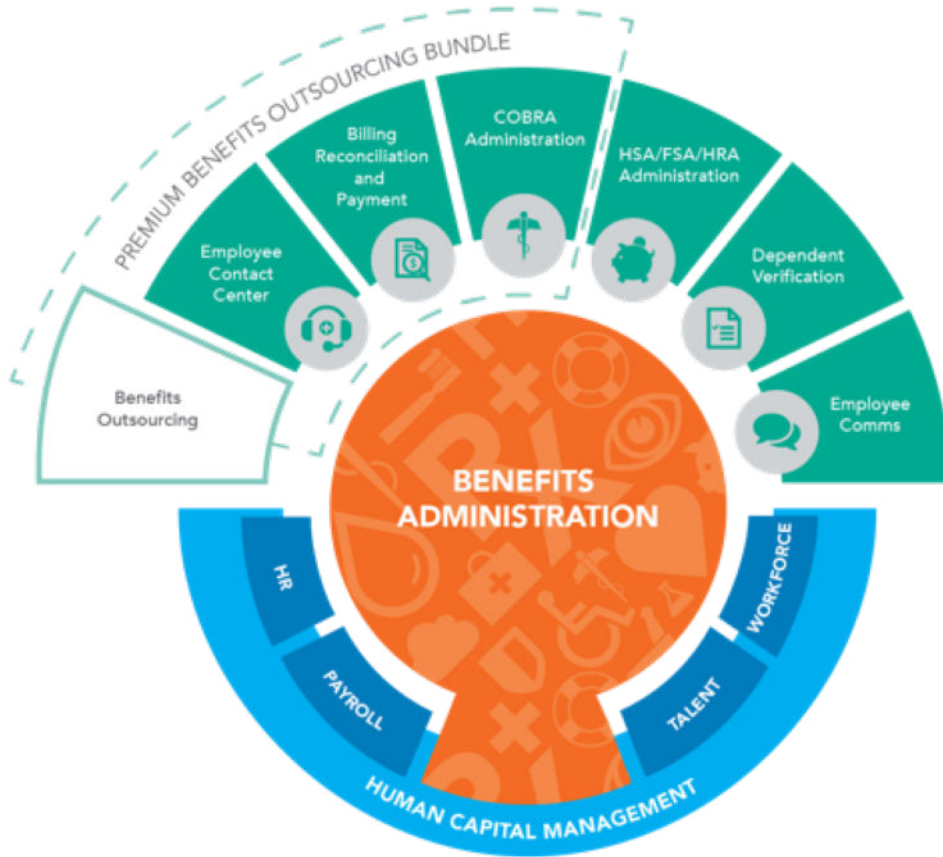


We will be live-tweeting. Contribute to the conversation! #CelebrateOE

The background is a dark grey color with a pattern of light grey icons representing various business and financial concepts, such as a calculator, a piggy bank, a gear, a magnifying glass, a bar chart, a handshake, a medical cross, a lightbulb, a document, and a paw print. A thick orange border frames the central text area.

Better Technology for a Better Benefits and HR Experience

PlanSource provides flexible and intuitive benefits administration software and services to more than 3.5 million consumers.



Software + Services = Best Benefits Experience

PlanSource offers a full suite of benefit services that ensures that you get the most out of your benefits technology investment.



Jessica Foust

Director, Employee Communications

PlanSource

A top-down view of a party setup on a light blue surface. In the center, a white cup of black coffee sits next to several pink donuts topped with colorful sprinkles. A green party hat with a gold band and a lit sparkler are also visible. Scattered around are green circular confetti, a white card with the text 'con pino', and a green pen. The scene is bright and celebratory.

Great Parties Start with a Great Plan



Communication Plan

Apply new strategies, technologies and techniques to your plan



Omnichannel Approach

Be present at every touchpoint



Increased awareness



Consistent messaging



Channel preference



Creates a unified experience

Effective Benefits Communication

86%

of professionals name email as
their favorite mode of communication

Challenges With Email Communications



Average office worker receives **121 emails a day**



Percentage of emails that have a malicious attachment: **2.3 percent**



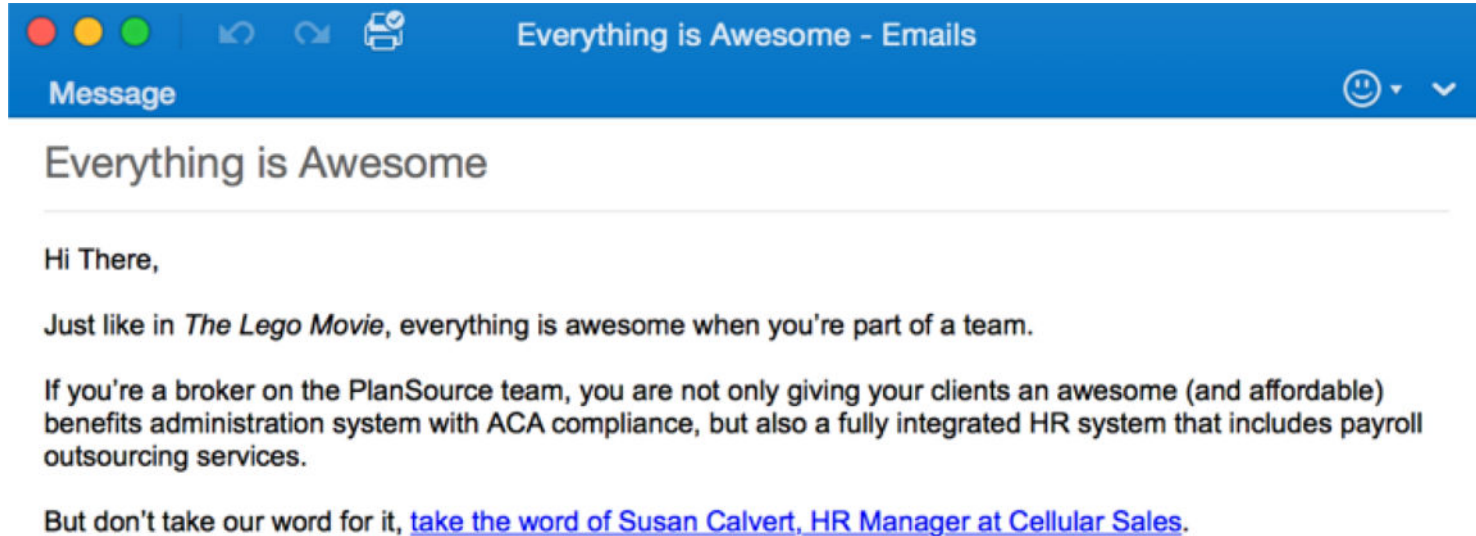
Percentage of email that is spam: **49.7 percent**



Open rate for email sent in North America: **34.1 percent**

Apply Email Marketing Best Practices

Use an attention-getting subject line



If they don't open it, it doesn't matter what's in it!

Apply Email Marketing Best Practices

Keep them as short as possible | Follow this simple outline



Don't do too much education in the email, instead, link to videos

Short paragraphs, and use bullets whenever possible

Include calls-to-action with a deadline to create a sense of urgency

Use "reply" to a prior email rather than repeat yourself

Text Messaging as an Alternative to Email



Text messages have a 98% open rate



90% of all text messages are read in under 3 minutes



70% of U.S. consumers appreciate getting texts from healthcare providers



Sales prospects who are sent text messages convert at a rate 40% higher than those who are not sent text messages

Text Messaging Pros and Cons



Relatively inexpensive way to reach your employees (and their spouses!) where they are

Simple, easy and convenient for your on-the-go employees with a 98% open rate

Great for announcements, reminders and CTAs with links



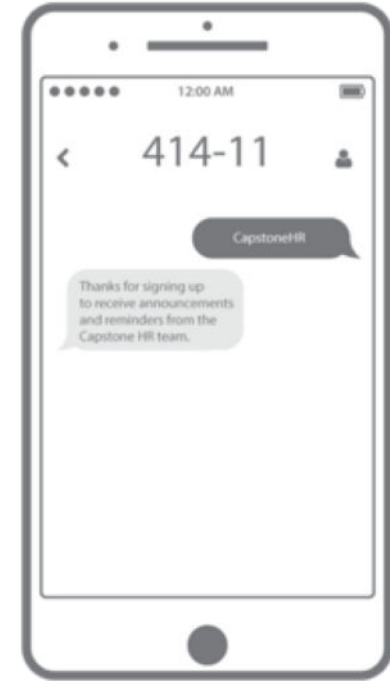
160-character limit means your message must be simple

Employees should opt-in, and they may not want to receive texts from you 😞

Employees who don't have unlimited text messaging will have to pay for texts they receive






Best HR Use Cases for Text Messaging

- 1 Notifications and reminders
- Links to educational videos or login pages
- Links to download an app or complete a survey
- State of emergency / disaster recovery communications
- Health and wellness tips and reminders



Opt-In Process

Communicate early and often

-  Notifications and reminders
-  Links to informational materials
-  Schedule communications ahead of time
-  Use a timeline
-  Communicate regularly

Example Timeline



Example Timeline with Steps & Tactics





Start Strong

First impressions are everything

Make It Visual

90%

of information transmitted
to the brain is
visual

60,000

times is how much faster
visuals are processed
than ***text***

On-Demand Information

Provide benefits info employees can access & have access to experts

Anytime, anywhere access

Quick response times

Mobile-friendly content

Interactivity

Gamification



Benefits Websites



One central location for employees/partners to visit for benefit related needs



Un-gated content

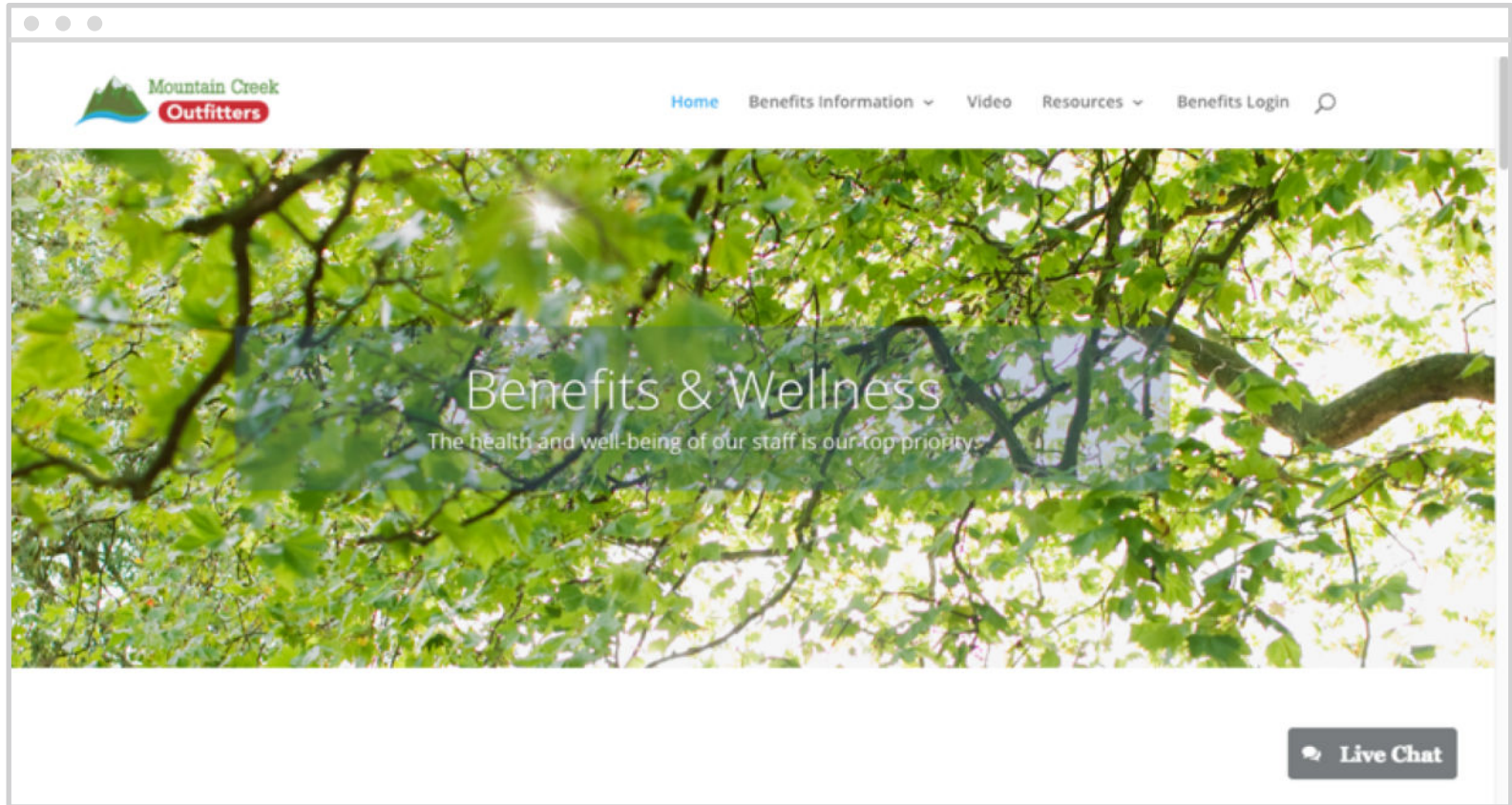


Able to monitor site and gather analytics and metrics



Employee's digital expectations and on-demand lifestyle are met

Benefits Website Example





Get Personal

Implement segmentation strategies and communication methods that work best for the employee.

Personalization on Mobile

Marketers know a lot about you so they can present the most relevant ads

Blanket email messaging to an entire company is no longer effective

Employees will be more apt to engage in personalized content versus generic content

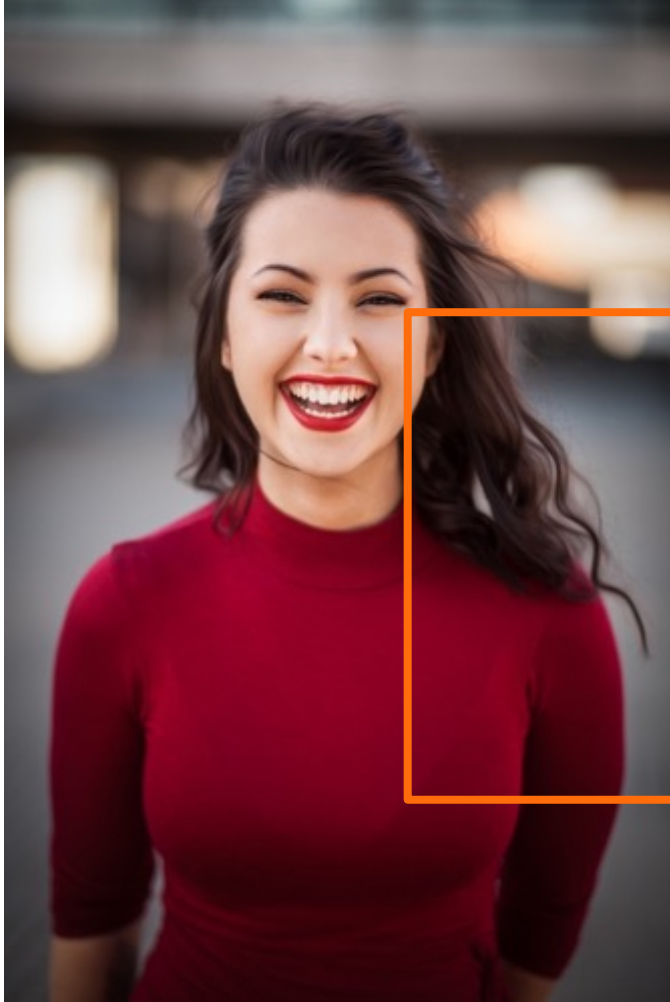
Partner with an HR or benefits technology company that can provide personalized messages

- Let employees decide how they want to receive your messages - via app notifications, text messaging, email, etc.
- Must be able to generate messages based on workforce characteristics such as: enrollment status, classification, gender, location, union status, and benefits accepted



Invite Engaging Guests & Entertainment

Deploy influencer marketing within your organization



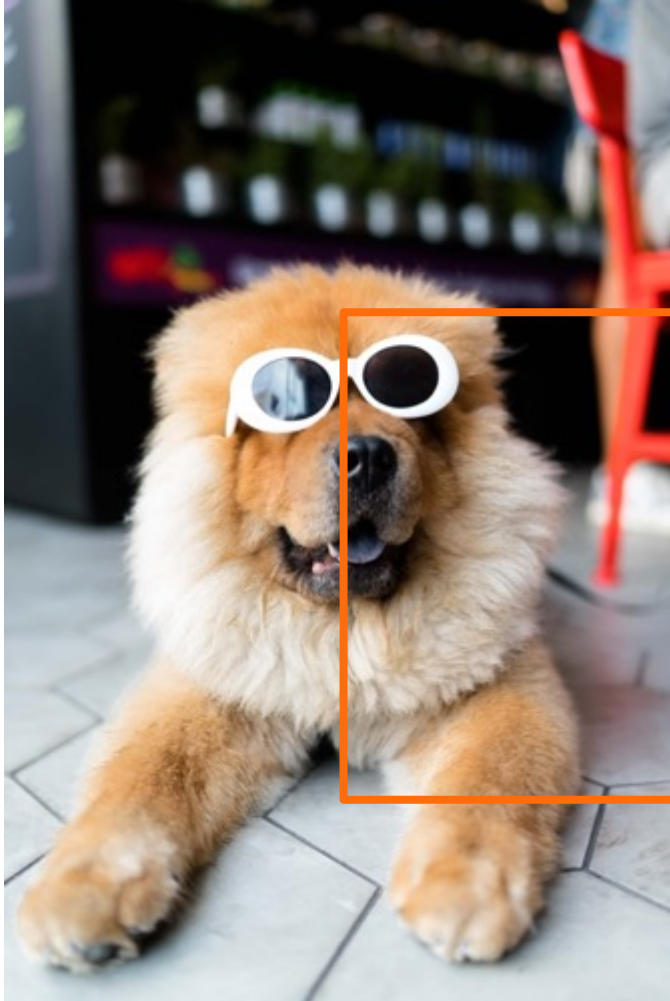
Who is an Influencer?

An individual within your organization who is influential with their peers and publicly supports your benefits program.

How to Get Influencers Involved

Create and deploy employee testimonial content in your benefits communication

- ✓ Plan for a lot of great content
- ✓ Ask for volunteers in different groups of your organization
- ✓ Get influencer's for different benefit programs to ensure you have a variety of content and personal stories to use
- ✓ Create a process and be clear with the influencer's about what you want
- ✓ Make the influencer's look great in any video, imagery and descriptions you use about them



Make communications more fun

The more engaging and different your communications are the more your message will be read and enjoyed.

3 Keys to Fun Communication

Break through to employees by remembering these three keys to spice up your communication materials

Show, Don't Tell

Humor

Simplification



3 Keys: Show, Don't Tell

Key: A lot of text can be intimidating, so try to be brief and entertaining

A person is shown from the chest up, sitting at a desk and working on a laptop. The person is wearing a dark jacket over a striped shirt. The background is softly blurred, showing office furniture and a window with light coming through. A white mug is on the desk in front of the person. The overall lighting is warm and professional.

Use Videos to Educate Employees

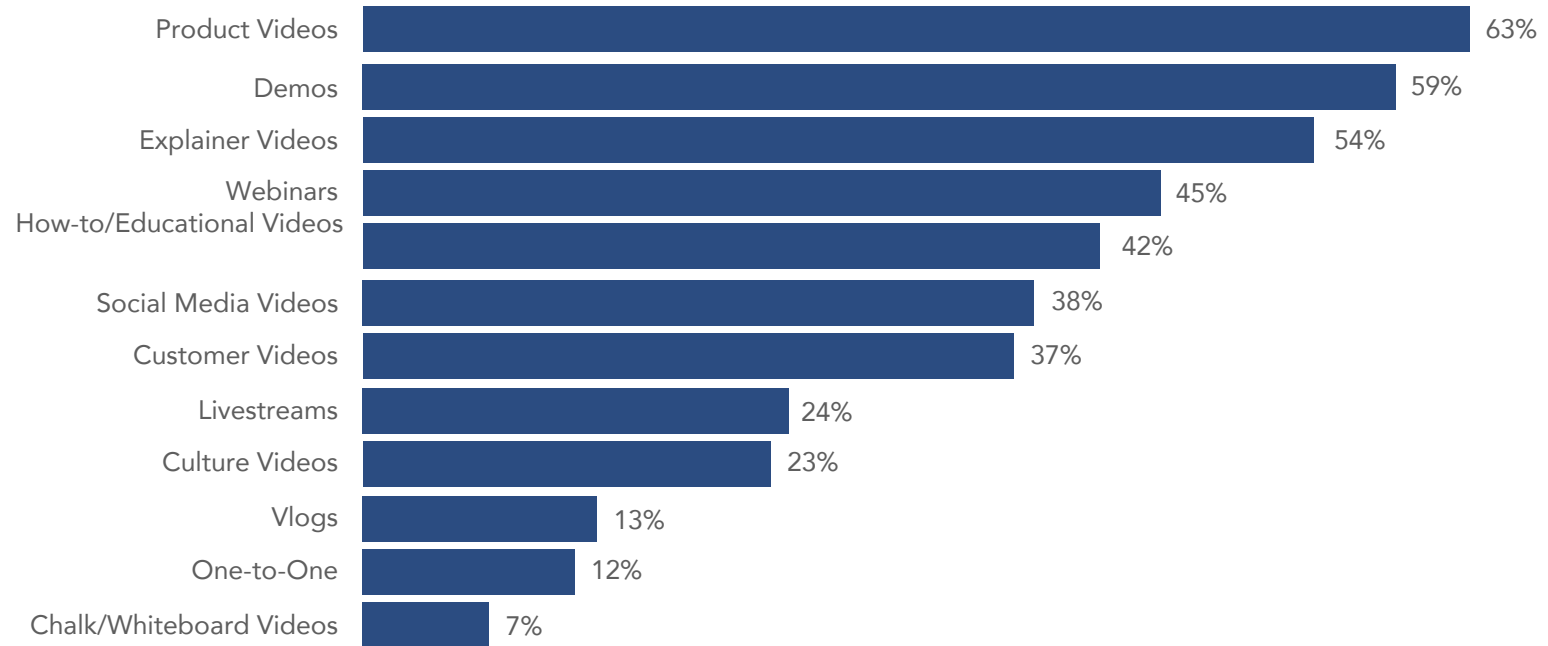
Workers are likely to retain 95% of a message when they watch a video (compared with only 10% when reading it in text)

54% of employees expect to see video

People watch 8 billion videos per day on Facebook

Employees struggle to understand voluntary benefits

Types of Videos Businesses are Investing In



Sources – Demand Metric State of Video Marketing
November 2017, Demand Metric, Sponsored by Vidyard

Best HR Use Cases for Video



Training and education



OE and benefits info



Health and safety



Mission, vision and values



Employee onboarding



Corporate changes




Brand re-enforcement

3 Keys: Simplification

Key: A lot of text can be intimidating, so try to be brief and entertaining





3 Keys: Humor

Key: Add in humor or a dose of personality into the materials you craft

3 Keys: Humor



Employees want a human connection



Avoid jargon and HR speak like the plague



Let your HR brand and personality shine through



Add an occasional GIF or fun imagery to lighten up communication materials

OE Themes with Personality



A smartphone is positioned in the upper left corner, displaying the Facebook login page. The screen shows the 'facebook' logo, a search bar, and a 'Log In' button. The status bar at the top indicates 'T-Mobile.pl' and the time '10:38'. To the right of the phone, wooden letter tiles are arranged on a dark wooden surface to spell out the word 'SOCIAL' in two rows: 'S', 'O', 'C', 'I', 'A', 'L' in the top row and 'M', 'E', 'D', 'I', 'A' in the bottom row.

S, O, C, I, A, L

M, E, D, I, A

Go Social

Increased Customer Recognition

Increased Customer Brand Loyalty

Creates a Richer Customer Experience

Increased Customer Insights



What People Remember

How to ensure your benefits materials are memorable

What people remember most about a celebration & your open enrollment

The first 5 minutes

**The high (or low) of
the party**

The last 5 minutes

**The first
communication
materials you
send out**

**How the benefit
meeting and general
benefit sentiment**

**The last
communication
material you send out**

You don't have much time to make an impact

**30 Minutes
or Less**

The amount of time employees spend choosing health care benefits each year.

How to make a lasting impression

Don't let the party end with open enrollment

Your content should:

Educate | Inform | Entertain | Engage

Your content and information should:

be sent out regularly all year long

One More Reason to Celebrate...



2018 OE Kit

Take a look at plansource.com/oekit



Q&A

Celebrate Open Enrollment: Best practices and practical tools for OE communications

Contact Us

www.plansource.com/getintouch

877-735-0468

PLANSOURCE[®]
One Source. Many Benefits.

Get the Kit!

www.plansource.com/oekit

OE Communications