

# 9 Tips to Nail Your OE Communications Strategy

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## Today's Speakers



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## TODAY'S AGENDA

Importance of benefits  
communications

9 tips to nail your OE comms

Free out-of-the-box OE themes

Q&A



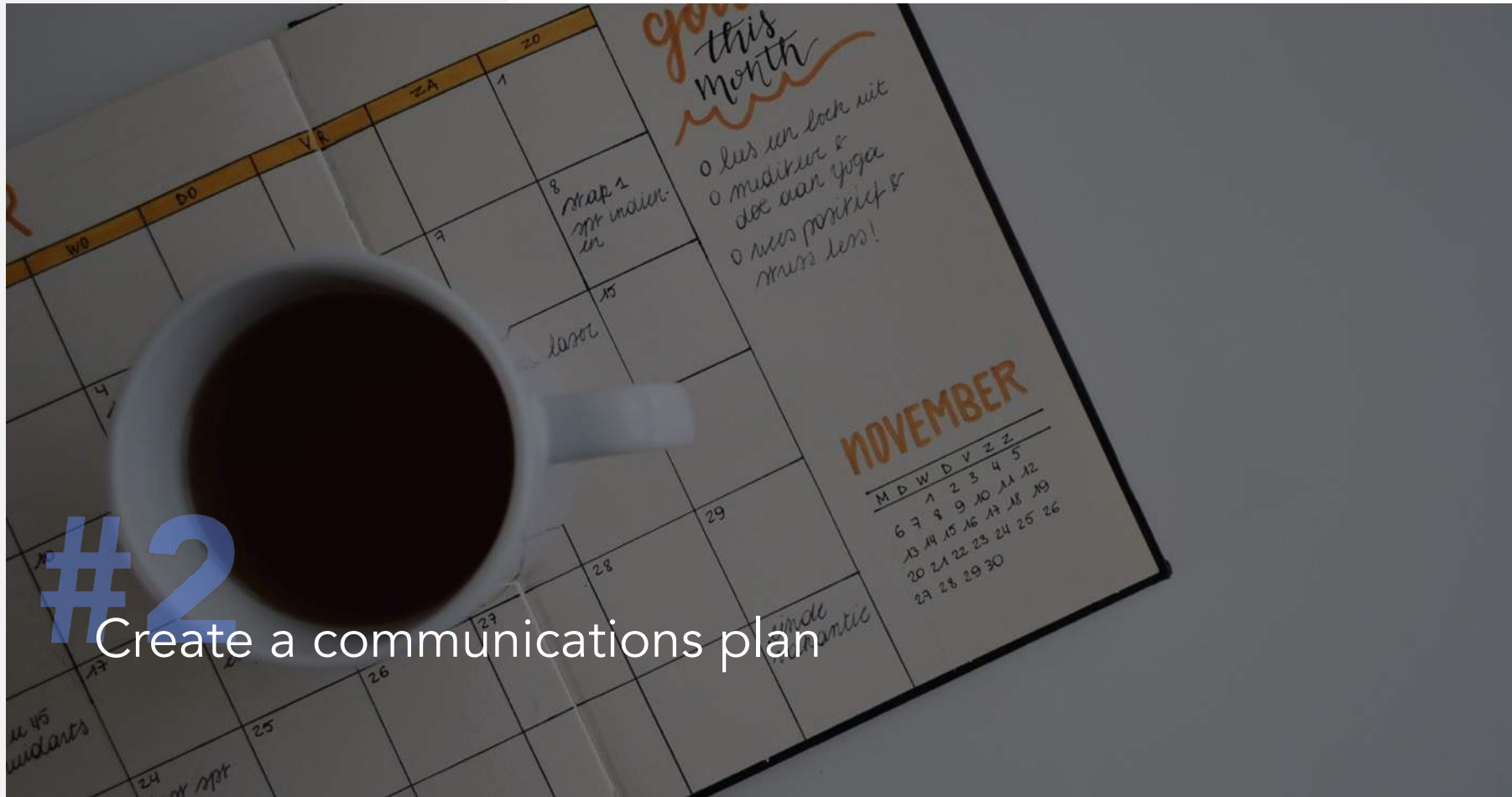


# #1

Align your communications to your unique benefits strategy and objectives

## SAMPLE OBJECTIVES

- Increase HDHP participation
- Introduce new voluntary benefits
- Increase employee engagement and understanding
- Increase employee appreciation



# #2

Create a communications plan

# #2

## Create a communications plan



### PLAN

Map out your strategy



### INFORM

Create awareness



### ENERGIZE

Drive employees to action



### FOLLOW-UP

Explain next steps

Pre-Open Enrollment

Open Enrollment

Post Open Enrollment





#3

Know your audience

# #3

## Know your audience

### **SURVEY YOUR EMPLOYEES**

Ask about their  
communications preferences

### **DEMOGRAPHICS ARE IMPORTANT**

Millennials will read your  
texts but don't count on  
email catching them

### **TAILOR THE MESSAGE**

New employees need more  
info than experienced  
employees.





#4

Use multiple communication methods.  
Try something new!



#4

Use multiple communication methods.

# #4

Use multiple communication methods.

VIDEOS

RESOURCES AND HELP

MEETINGS

REMINDERS AND BRANDING

# #4

Use multiple communication methods.

VIDEOS

1 MIN

One minute of video is  
the equivalent of 1.8M words

75%

Employees are 75%  
more likely to watch a video  
than read

# #4

## Types of Videos: Benefits Education Videos

### PLANSOURCE VIDEO LIBRARY INCLUDES TOPICS LIKE:

- What is an Employee Assistance Program?
- Know Where to Go (Telehealth)
- What are Beneficiaries?
- What is Vision Insurance?
- Commuter Benefits





# #4

## Types of Videos: Open Enrollment Videos



### **CREATE VIDEOS THAT:**

- Announce open enrollment
- Explain how to enroll
- Showcase benefit plans

# #4

## Types of Videos: Employee Testimonial Videos



### **CREATE VIDEOS THAT:**

Good experiences utilizing health benefits

Employee success stories

Select individuals who will publicly support your benefits program

# #4

## Video Pros and Cons

### PROS

Video is great for explaining complex ideas and information

Reduces the cost of employee training

Video is preferred in the workplace

Can add interactive elements

Consistent, on-demand messaging

### CONS

Up front production costs can be expensive

Can take a long time to produce/edit

No direct feedback

# #4

Use multiple communication methods.

## MEETINGS

In-Person Meetings

Virtual Meetings (yay Zoom Meetings)

Virtual Benefit Fairs

# #4

## Meetings

### PROS

#### In-Person/Virtual

- Provides employees with an opportunity to get all the details and ask questions
- Offers face time with the employees
- Easily handout prepared materials
- Vendors and partners can conduct sessions

#### Benefits Fair/Virtual

- Live content
- On-demand content
- Q&A sessions
- Family members can participate
- Easier to put together
- Can reuse content for new hire training and recruiting

### CONS

- Easy to lose employee interest
- Can be long and overwhelming
- Time intensive to put together



# #4

Use multiple communication methods.

## RESOURCES AND HELP

Benefit Website

Call Center

Live Chat

Print Materials

# #4

## On-Demand Resources & Help

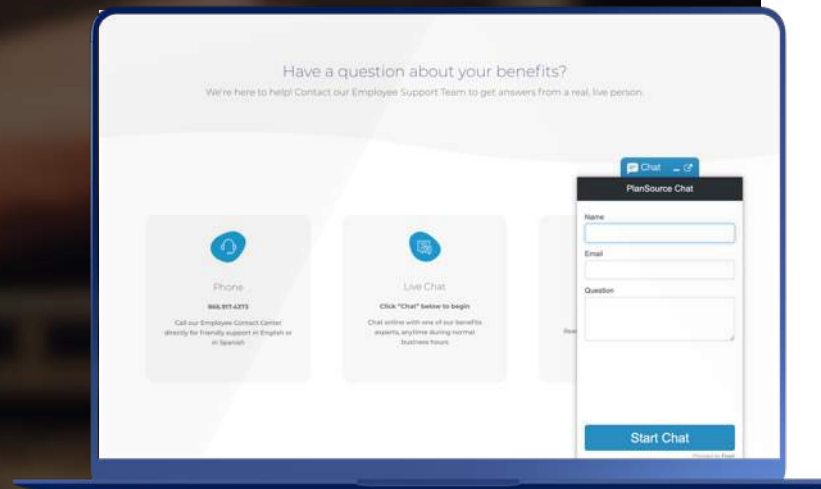
Anytime, anywhere access

Quick response times

Mobile-friendly content

Interactivity

Gamification



# #4

## Resources & Help: Benefits Website



Central information hub

Un-gated content

Metrics and analytics readily available

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

# #4

## Resources & Help: Call Center & Live Chat

Answer employee questions in real-time

Login assistance

Phone-based enrollment

Employee advocacy

Urgent coverage resolutions





# #4

## Resources & Help Pros and Cons

### PROS

Anytime, anywhere access

Frees up your team's time to focus on more strategic initiatives

Encourages interaction and direct feedback

Increases employee awareness, understanding and appreciation of their benefits

Track key interactions, costs and performance of resources with analytics

### CONS

Time setting up resources and materials

Extra costs setting up services like live chat and call center

Longer lead time to go-live



# #4

## Use multiple communication methods.

### REMINDERS AND BRANDING

Email

Text Message Reminders

CEO Voicemail

Custom Screen Savers

# #4

## Reminders and Branding: Email

Email still has the ability many channels don't: creating valuable, personal touches – at scale.

86%

Of professionals name email as their favorite mode of communication

Source: Connect Mogul | Loyalty 360 | Velocify eReach.com texting statistics

# #4

## Email Pros and Cons

### PROS

Easy, simple, efficient and essentially free, and employees are comfortable with it

A lot of design and content can be included, with links to additional information

### CONS

Employees are bombarded with emails

Our emails get opened less and less all the time



# #4

## Reminders and Branding: Text Messaging

Text messaging is on every mobile device and your next HR goal is just a message away.



# #4

## Reminders & Branding: Texting Best Practices

Be clear about what employees will get via texts

Schedule your texts

Be aware of frequency

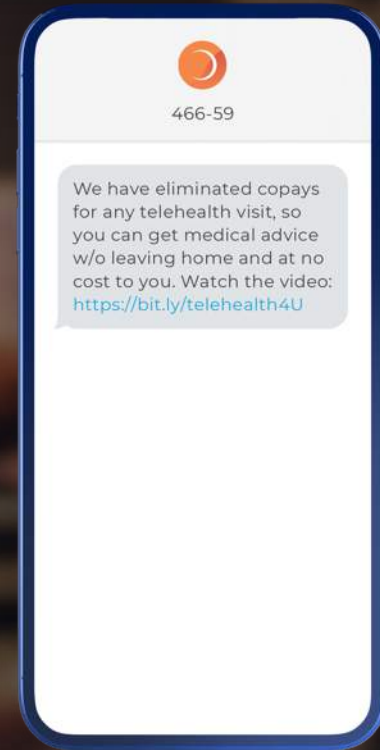
Text during normal hours

Provide value

Use short and concise messaging

Set up groups & personalize the texts

Measure what works



# #4

## Texting Pros and Cons

### PROS

Relatively inexpensive way to reach employees wherever they are

Simple, easy and convenient for your on-the-go employees

Great for announcements, reminders and CTAs with links

### CONS

160-character limit means your message must be simple

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

# #4

Use multiple communication methods.  
This year try something new!



CEO MESSAGE



SCREENSAVER



#5

Personalize the message

# #5

## Personalize the message

### WHY PERSONALIZE COMMUNICATIONS?

Builds a deeper relationship with employees

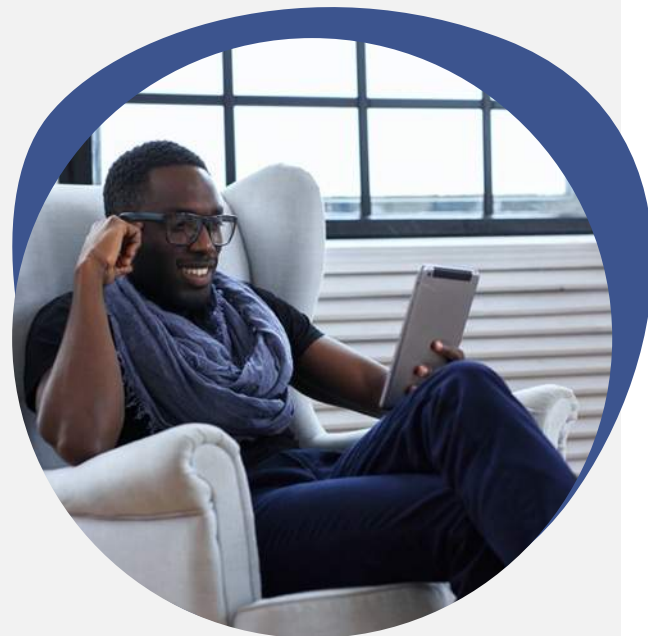
Provides relevant content

Gives a face to HR

Offers better recommendations

Boosts engagement

Drives enrollment and participation

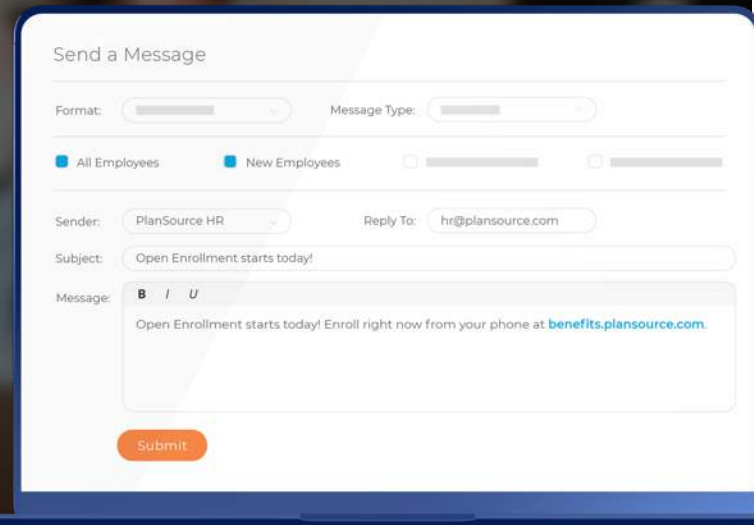


# #5

## Target Specific Segments of Employees

### MESSAGE EMPLOYEES BASED ON WORKFORCE CHARACTERISTICS

Enrollment status  
Classification  
Gender  
Location  
Union status  
Enrolled benefits



Send a Message

Format:  Message Type:

All Employees  New Employees

Sender:  Reply To:

Subject:

Message: **B / U**

Open Enrollment starts today! Enroll right now from your phone at [benefits.plansource.com](https://benefits.plansource.com).

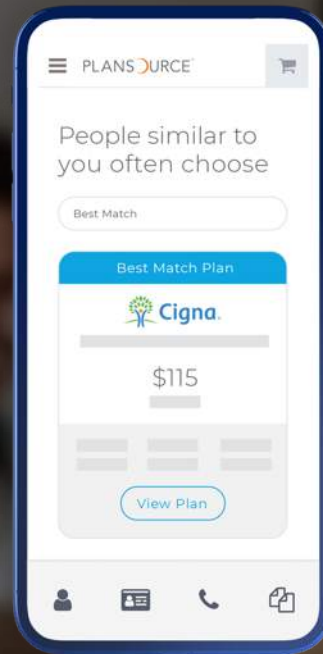


# #5

## Examples of Personalized Messaging

THE AVERAGE EMPLOYEE IS FULLY EXPECTING PERSONALIZATION IN EVERY COMMUNICATIONS CAMPAIGN YOU RUN

- Targeted emails
- Custom video messages
- Benefit recommendations
- Social media



PLANSOURCE DECISIONIQ  
AI/ML technology surfaces personalized insights in the shopping experience

# #5

## Mobile is Key to Personalization

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

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

Blanket email messaging to an entire company is no longer effective

Automation is critical to creating one-to-one experiences with employees



The background of the slide is a collage of various envelopes and tags. There are several white envelopes of different sizes and orientations, some with their flaps open. There are also several light brown or tan envelopes, including one prominent one in the lower-left quadrant. Some of the envelopes have small, rectangular tags attached to them with a hole at the top. The overall aesthetic is clean and professional, suggesting communication or organization.

#6

Ensure that your message is consistent and inclusive

# #6

## Ensure that your message is consistent and inclusive

### **BRANDING**

Communications should have consistent branding and design across all materials and media.

### **HUMAN**

Employees may have different perceptions and expectations when receiving information – consider these differences when developing communications.

### **MESSAGING**

Deploy consistent messaging regardless of the materials, media and channels you use.

# #6

## Strike the right tone

May need to shift common benefits tone of upbeat and humorous to empathy and support when needed.

Focus on your employees' current situations and needs to determine the right tone for your benefits communications.



The background of the slide is a collage of various envelopes and tags. There are several white envelopes of different sizes and orientations, some with their flaps open. There are also several tan or light brown envelopes, including one prominent one in the lower-left quadrant. Interspersed among the envelopes are several white, rectangular tags with a hole at the top, resembling price tags or labels. The overall composition is a dense, layered arrangement of these items.

#7

Apply marketing best practices



The background of the slide is a collage of various envelopes and papers, some overlapping and some partially visible. The colors are muted, with shades of beige, light brown, and off-white. The overall texture is busy and layered.

#7

## Apply marketing best practices

BREAK IT DOWN INTO  
SNACKABLE CONTENT

PUT YOURSELF IN  
THEIR SHOES

INCLUDE CTAS  
AND DEADLINES

USE A PROFESSIONAL  
DESIGNER

MAKE YOUR MESSAGE  
SCANNABLE

USE ATTENTION-GETTING  
SUBJECT LINES

# #7

## Apply marketing best practices

Snackable Content:  
Short, sweet and to-the-point



# 67%

Our mobile self-service features saw a 67% increase in employee use

The background of the slide is a collage of various envelopes and papers. There are several white envelopes, some with their flaps folded, and a few brown envelopes. Some papers have tags attached to them. The overall aesthetic is clean and professional, suggesting a focus on communication and design.

#7

Apply marketing best practices  
Use a professional designer

**BETTER DESIGN EQUALS**

Better engagement

Better interactions

Better understanding

Better action

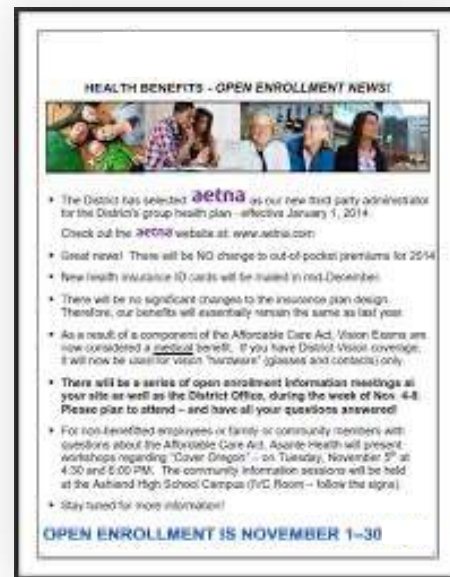
# #7 Do this, not that

## DO THIS



Snackable  
Scannable  
Call-to-action  
Well-designed

## NOT THIS



# #7

## Subject Line Examples | Good and Bad



A memo from the desk of HR



Nancy, open enrollment starts tomorrow 🎉



Learn about 2022 Benefit Election Options





New to benefits? Check out these entertaining videos. 📺



# #7

## Subject Line Examples | Good and Bad

 2021 Open Enrollment

 Ready, set enroll!  
OE is open 🏁

 2021 Open Enrollment  
almost over

  Only 1 day left:  
Enroll today or lose coverage!



# #7

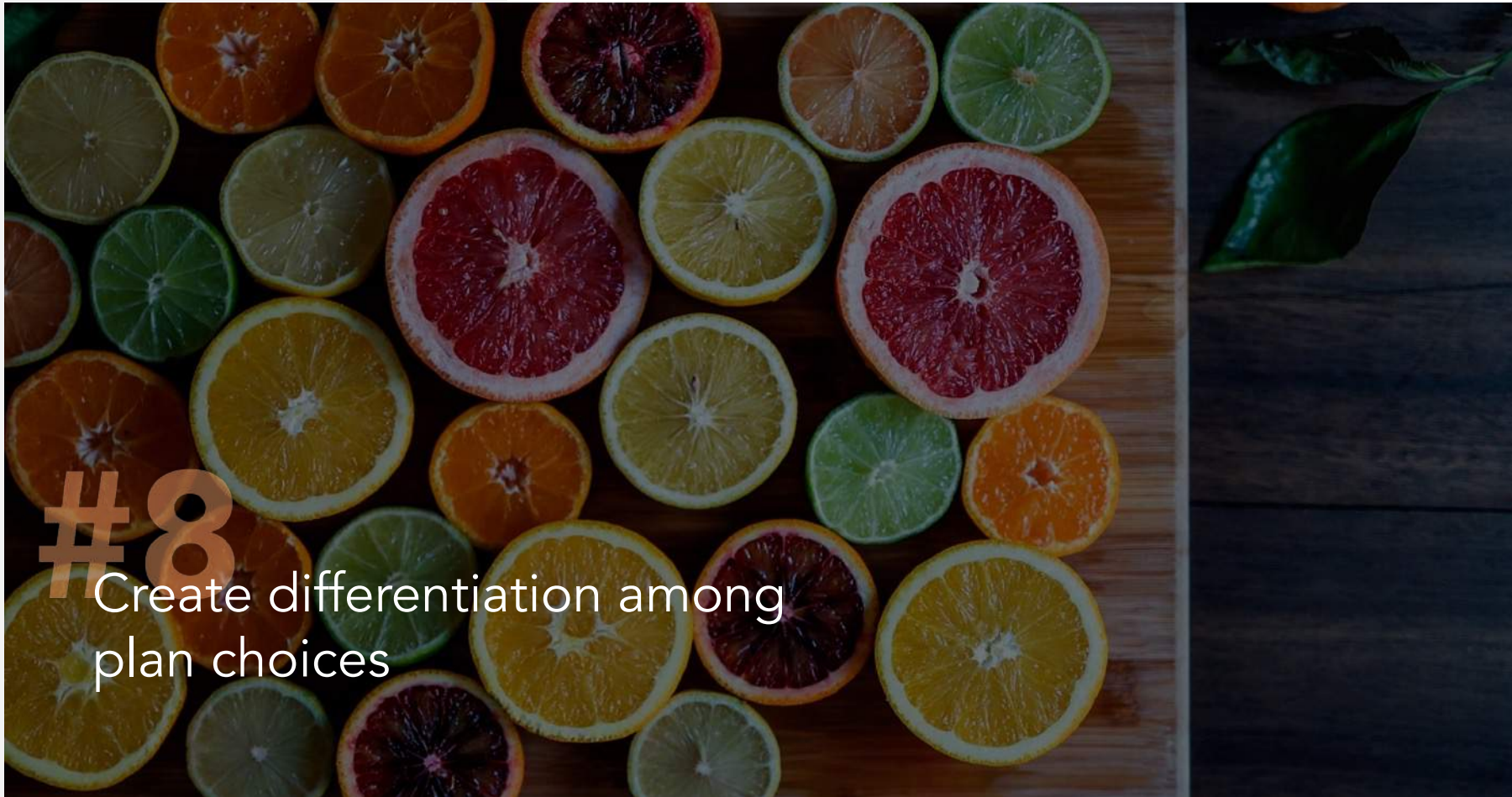
## Subject Line Examples | Good and Bad



Department and  
Division Plans Have  
Been Updated  
Depending on  
Specific Contractual  
Arrangements



Nancy, don't miss out on these  
new perks and benefits! 👍



#8

Create differentiation among  
plan choices

# #8

## Create differentiation among plan choices

A noticeable difference in premiums, copays and coinsurance for HDHPs

Explain the benefits of pre-tax savings, sesame street style

Make your plan names less intimidating

Promote your employer contribution to the HSA

# #8

## Promoting Your HSA Contribution



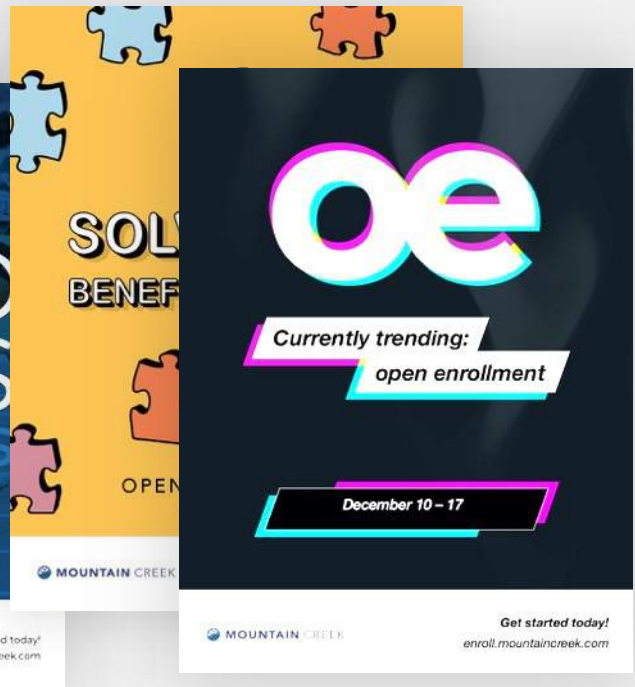
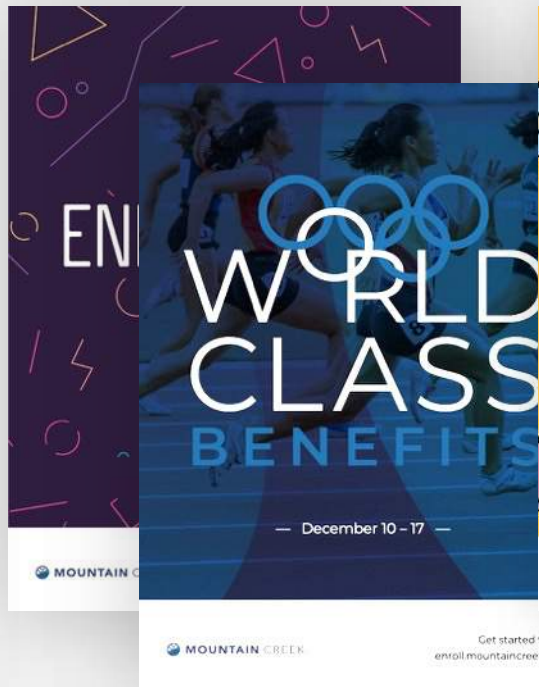
We'll match up to 3% of your contributed amount.



If your salary is \$40,000 and you take full advantage of our HSA match, that's an extra \$1,200 each year toward your medical expenses - now or in retirement.

# #9

## Brand your open enrollment experience





A close-up photograph of a hand holding a pen, poised to write on a checklist. The checklist is on a grid-lined notebook and includes items like 'Drive to work', 'Drive to school', and 'Mow lawn'. The background is slightly blurred, showing a laptop keyboard.

# Q&A

**TO LEARN MORE:**

[plansource.com/resources](https://plansource.com/resources)  
[plansource.com/oethemes](https://plansource.com/oethemes)  
[plansource.com/videolibrary](https://plansource.com/videolibrary)