



# Improving the open enrollment process

## 10 tips for employers

According to a recent survey, just half of employees understand their voluntary benefits at least very well.<sup>1</sup>

Even if you've meticulously researched providers, budgeted the costs and signed the contracts, your employee benefits package will be less valuable without a successful open enrollment. The open enrollment process helps employees understand what benefits are available to them, sign up for the benefits they need, and ensure their coverages are sufficient for themselves and their families.

Unfortunately, employees are busy and understanding benefits can be challenging, so many employees don't use their benefits to their fullest potential. Here are some tips to help ensure that your open enrollment is successful.

### 1. Review your past enrollments

It never makes sense to continue doing things that aren't working. After each annual enrollment, review what was successful about the process and what could be improved. Survey your employees and use the data you've collected to uncover which communication methods (email, print, meetings, etc.) yielded the highest enrollment or sparked the most feedback.

### 2. Share information early

Benefits information can be complicated, and sharing it early is essential to give employees time to prepare. They should have enough time to review their options and ask questions well before enrollment actually begins. At a minimum, make sure the materials answer:

- Why employees might need the benefits.
- Which options and amounts will fit their needs.
- What value the programs or benefits provide to the employee.
- What the benefits will cost per paycheck.

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About 6 in 10 employees say they would take advantage of advice from an online program in making their benefit decisions.<sup>1</sup>

### 3. Customize your information

If you have a sizable population of employees who only need simple information—such as young, single employees choosing benefits only for themselves—consider materials and benefit meetings that focus on the highlights. You can save time for them and dedicate more time to employees who have more complex needs. Also be sure to include sample cost calculations for individuals, instead of only couples and families. It's important to tailor your materials to the employees' needs.

### 4. Get families involved

For employees who have spouses, partners and families, benefit choices affect a larger number of people. Consider making presentations and webinars available to family members or scheduling them after-hours so families can learn and make choices together. This can be especially valuable when families are coordinating benefits from two separate employers. Also consider whether all family members are English-speaking and if additional translations may be necessary.

### 5. Make it personal

When possible, use testimonials to help “sell” the importance of the benefits you offer. Even if the testimonial is anonymous, the value and importance of a particular benefit becomes more relatable to employees when they can see how it helped a coworker. Provide content that will resonate with the employees you're working with.

### 6. Use every resource

Use resources from internal and external partners to improve your enrollment process. Enlist your company's marketing team to create emails and materials that are on-brand and professional. Your benefits carriers may offer online enrollment services that are more robust than you can provide in-house. When your enrollment materials are clear and user-friendly, you'll be more efficient and can spend more time helping employees with important questions.

### 7. Make it fun

Open enrollment is important, but you can also make it fun. Consider offering raffle prizes for early enrollees. Door prizes and handouts can boost attendance at enrollment fairs and information sessions. Online quizzes can ensure that materials are read thoroughly. A few dollars spent on prizes can go a long way toward increasing participation and engagement.

### 8. Communicate broadly

Employers have a wide range of tools at their fingertips for communicating benefits information. This can range from simple signs and posters in break rooms to dedicated websites for enrollment. Make sure you communicate in the way that reaches your employees most effectively. Many employers are broadening their tools to include texting and social media, and streaming videos can help reach employees who can't attend live presentations.

### 9. Remember remote workers

Even if you have just a few remote workers, it's important that they feel prepared, involved and heard during open enrollment. Virtual benefit fairs, webinars and videos can help them feel connected with the process when they're not located near an HR office. Establishing dedicated times for call-in questions can ensure that HR representatives are available for consultations.

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## 10. Use your broker

Your benefits broker is a valuable resource for answering questions about your policies, providing tools and assistance during open enrollment, and serving as a go-between for you and your carriers. It's a year-round conversation; partner with your broker to assist with your benefits communications and enrollment strategy.

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**To learn more, contact your benefits broker  
or group benefits representative.**



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<sup>1</sup> "2021 Workplace Wellness Survey". Employee Benefit Research Institute. Accessed Apr 5, 2022 from [https://www.ebri.org/docs/default-source/wbs/wws-2021/2021-workplace-wellness-short-report.pdf?sfvrsn=c4553b2f\\_6](https://www.ebri.org/docs/default-source/wbs/wws-2021/2021-workplace-wellness-short-report.pdf?sfvrsn=c4553b2f_6).

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