

OPEN ENROLLMENT CHEAT SHEET

A Handy Timeline for OE Communications Planning

PRE-OPEN ENROLLMENT

PLAN

Map out your strategy

4-6 WEEKS BEFORE OE

- Choose a theme
- Select communication methods (email, text, Zoom webinars, posters, etc.)
- Schedule benefits webinars
- Create printed materials: posters, flyers and postcards ([try one of our designs!](#))
- Select benefits to highlight in daily "Did You Know" emails
- Develop your benefits guide and/or digital handbook
- Order a [custom video](#) to explain important changes in your benefits
- Draft email and text communications ([use our free templates!](#))

INFORM

Promote awareness & education

2 WEEKS BEFORE OE

- Send email or video postcard announcing OE dates and benefit webinars
- Display posters in prominent areas
- Mail postcards to employees (email or snail mail!)
- Send follow-up email with educational videos and other resources

1 WEEK BEFORE OE

- Send "What's New" email with key OE details and changes
- Hold benefits webinars
- Send follow-up email announcing "Open Enrollment Begins Tomorrow"
- Encourage employees to download the free PlanSource Mobile App

OPEN ENROLLMENT

ENROLL

Drive employees to act

DURING OE

- Use multiple forms of communication: email, text, video, skywriting
- Send daily "Did You Know" messages that highlight new benefits and changes
- Use attention-getting subject lines and clear calls-to-action (don't forget hyperlinks!)
- Incorporate your theme to sprinkle in the fun
- Offer personalized [decision support](#) resources within the shopping experience
- Automate reminders to employees who haven't started or completed enrolling

POST OPEN ENROLLMENT

ENGAGE

Maximize adoption & appreciation

AFTER OE

- Change your message to focus on how to use benefits
- Educate employees about how to make changes to benefits after a qualified life event
- Conduct a [dependent eligibility audit](#) shortly after open enrollment
- Send ongoing reminders about available benefits and opportunities (flu shots, 401(k) Zooms, etc.)
- Take a well-deserved vacation!