



We Fixed Open Enrollment So You Don't Have To

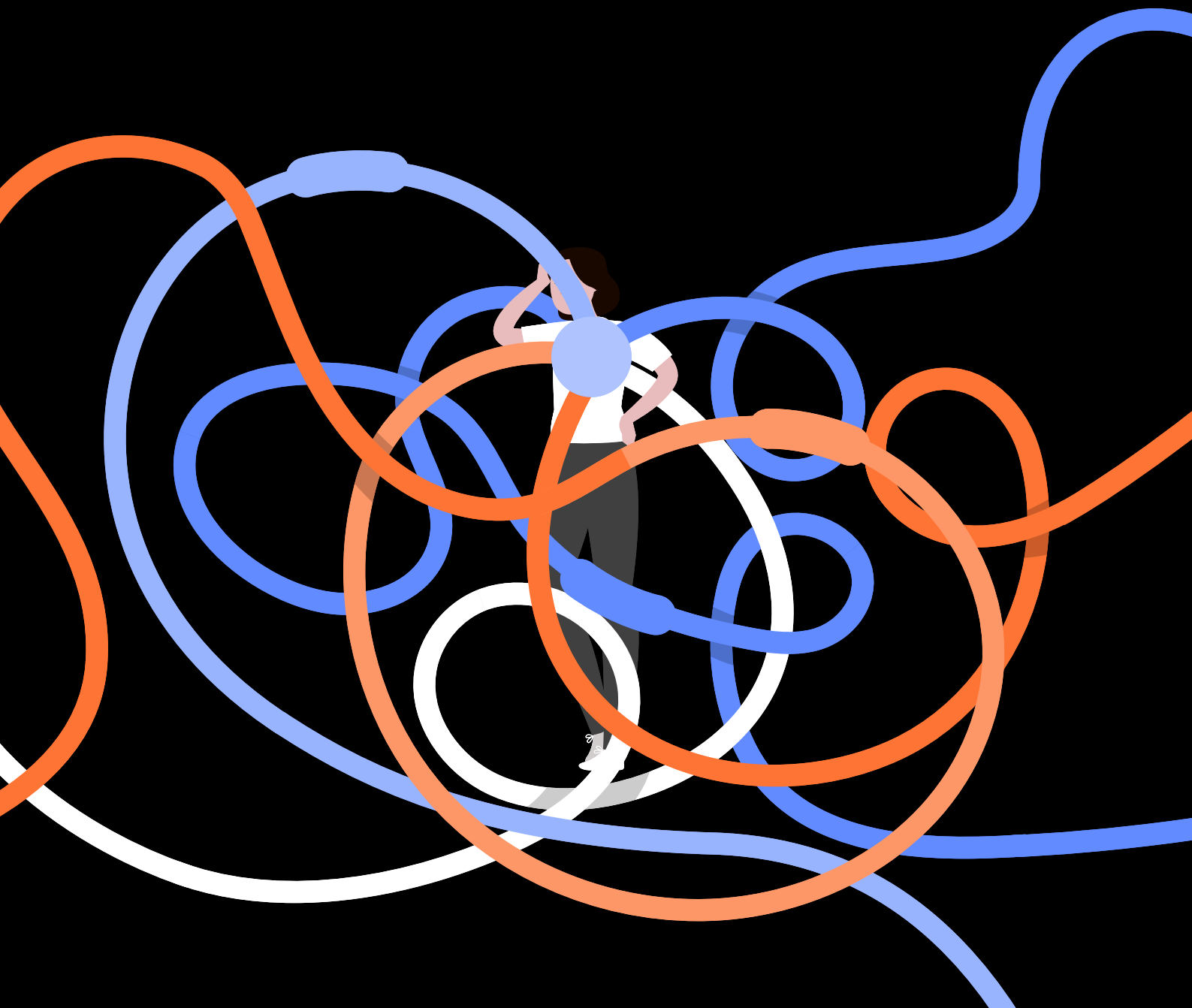


Picture this:

It's open enrollment season. Your inbox is overflowing, your calendar is jam-packed with Q&A sessions, and employees are wandering into your office (or your Zoom room) asking, "Wait, what's a deductible again?" "Should I set up an HSA/FSA?" "Is my provider in-network?" Sound familiar?

We get it. Open enrollment is your mission to space — every system needs to be checked, every launch window timed perfectly, and the entire crew depends on you to guide the shuttle home safely.

Here's the truth, open enrollment doesn't have to be chaos. Sure, it's a high-stakes time of year, but with the right strategies and tools, you can turn the stress into a smooth, streamlined process that works for everyone.



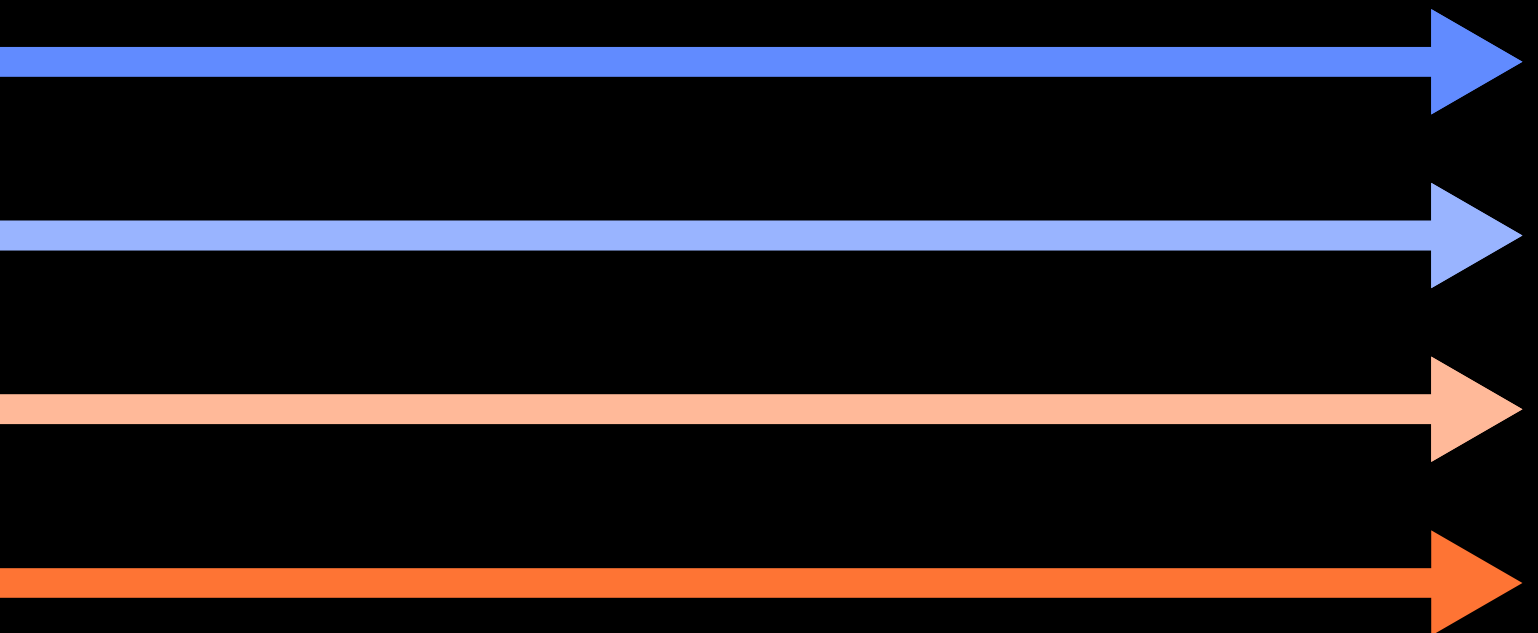
This playbook is your secret weapon.

Inside, you'll find practical strategies to:

- **Educate your employees without feeling like a broken record.**
- **Handle the endless questions (without spending your nights glued to your inboxes).**
- **Drive real engagement, so employees actually understand and appreciate their benefits.**
- **Mitigate stress with tried-and-true tactics from the pros.**

And the best part? We'll show you how to lighten your workload along the way. (Yes, really.)

So, grab a cup of coffee or tea, put your feet up (just for a minute!), and dive in. Together, we'll make this open enrollment season your most successful — and least stressful — yet.

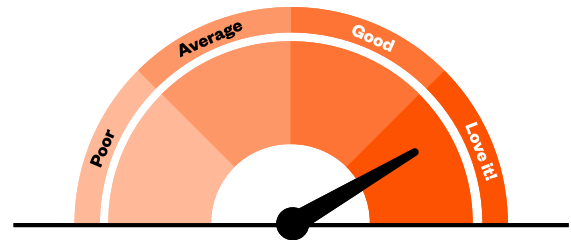


Part 1:

Planning for Open Enrollment

Step 1: Analyze Last Year's Enrollment Data

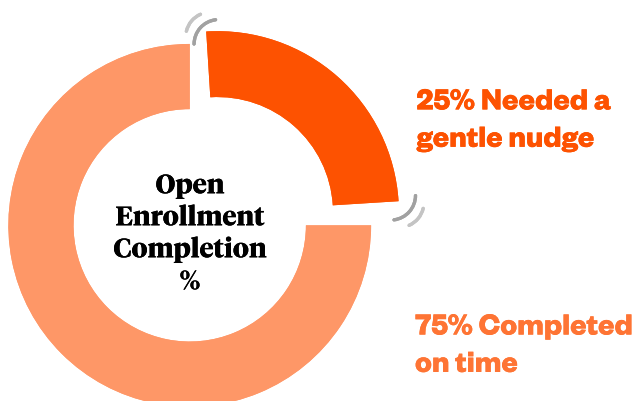
Before you charge into this year's open enrollment season, it's time to do some detective work. Think of yourself as the Sherlock or Enola Holmes of HR — digging into last year's enrollment data to uncover clues that can guide this year's strategy.



Healthcare perk sentiment - free telehealth

Here's where to start

- **Participation Rates:** How many employees actually completed their enrollment on time? (And how many needed those gentle last-minute nudges?)
- **Employee Questions:** Which benefits sparked the most confusion? Was it the difference between an HSA and an FSA? Or deciphering “in-network” vs. “out-of-network”?
- **Common Mistakes:** Did anyone miss enrolling dependents or overlook key offerings?
- **Analyze utilization:** What perks were loved (e.g., LinkedIn Learning)? What got zero use (e.g., HRAs)? This gives you the data to cut, replace, or promote more effectively.

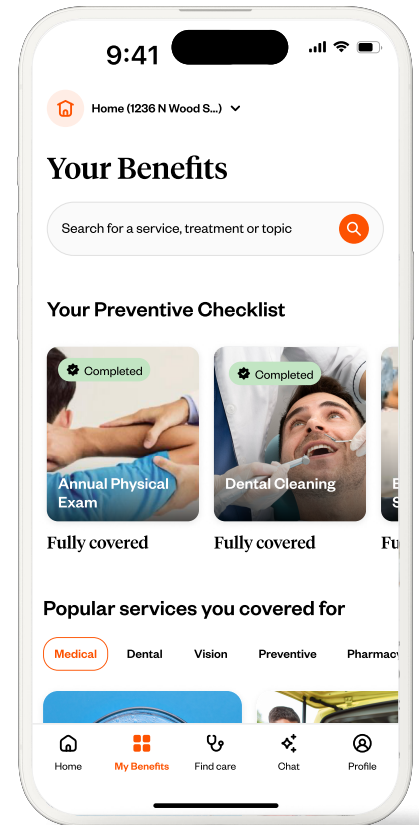


Use these insights to pinpoint what worked (yay, wins!) and where things got a little ... messy. This step isn't about perfection — it's about progress.

Step 2: Set Clear Objectives

Decide what success looks like this year. Some ideas:

- **Boost Engagement:** Higher participation, fewer last-minute signups.
- **Simplify Workloads:** Use tools like Healthee to answer both simple and complex FAQs automatically.
- **Highlight Benefits:** Promote underused perks like mental health and wellness programs.
- **Avoid Burnout (for Everyone):** Let's face it — overloaded HR teams and confused employees don't make for a great open enrollment experience. Setting realistic goals can help everyone breathe a little easier.
- **Factor in pricing changes:** Ask your PEO for plan options early. Review average/median costs, compare with previous years, and bring Finance in early to discuss budget alignment.



Pro tip: If your focus areas include boosting enrollment in high-deductible health plans (HDHPs) or driving engagement with underutilized benefits like mental health or wellness programs, tailor your communication strategy accordingly.

Step 3: Build a Timeline

- Pre-enrollment prep, communication launch, enrollment period, and follow-ups.
- Include milestones for employee engagement activities and incentivize/gamify employee experience.



Part 2:

Communicating Benefits Effectively

Key Takeaway: Employees don't engage with benefit they don't understand

Crafting an Engaging Communication Plan

- Multi-channel strategies: email, slack/teams, posters, virtual q&a sessions, webinars
- Tailored messaging for different employee groups (parents, new grads, caregivers)

Simplifying the Complex

- Use real-life scenarios: “How this plan supports your wellness goals”
- Avoid the dreaded 17-page PDF—keep it visual and digestible. Employees have started taking these and throwing them into ChatGPT anyways because it's too much to digest.
- Be transparent: If a plan's price jumps, explain why and offer alternatives

Driving Engagement

- Use storytelling to highlight the impact of benefits
- Encourage employees to explore options with tools like Healthee's digital assistant



Part 3:

Streamlining the Enrollment Process

Key Takeaway: Reduce friction for employees and HR teams alike.

Make Information Accessible

- Centralize resources: benefits guides, FAQs, decision-making tools.
- Spotlight Healthee's 24/7 support for common employee questions.

Automate and Delegate

- Automating repetitive tasks like answering basic questions with digital tools.
- Empowering managers to support their teams with key information.

Promote Self-Service

- How platforms like Healthee enable employees to navigate benefits independently.
- Use data to identify and proactively address bottlenecks.



Hello, I'm Zoe! How can I assist you today?

I am looking for a cardiologist.

Am I covered for a blood test?

Schedule a routine physical exam

Schedule a routine physical exam

You are entitled to routine preventive care visits with a Primary Care Provider (PCP) or Specialist. For in-network care, this exam requires a \$50 copay. Would you like to find a provider?

In Network

Not subject to deductible
\$50 copay per visit

Out of Network

Subject to deductible
20% member responsibility

| Type here...



Part 4:

Engaging Employees During Enrollment

Key Takeaway: Active participation leads to better outcomes for your employees, the HR team, and your bottom line.

Strategies to Drive Enrollment

- Personalized nudges and reminders (email, text, platform notifications).
- Use case examples: “Why enrolling in a wellness plan could save you \$\$\$.”

Gamification and Incentives

- Ideas for boosting engagement (Create contests, reward early enrollment, shout out engagement stars).

Virtual and In-Person Support

- Hosting live Q&A sessions, office hours, or webinars.
- Promoting Healthee’s tools as a 24/7 extension of HR.



Part 5: Measuring Success and Post-Enrollment Action Steps

Key Takeaway: Post-enrollment analysis is as important as OE itself.

Evaluate Outcomes

- Key metrics: participation rates, employee satisfaction, most-asked questions.
- Healthee analytics: what features were most used, what resources fell flat

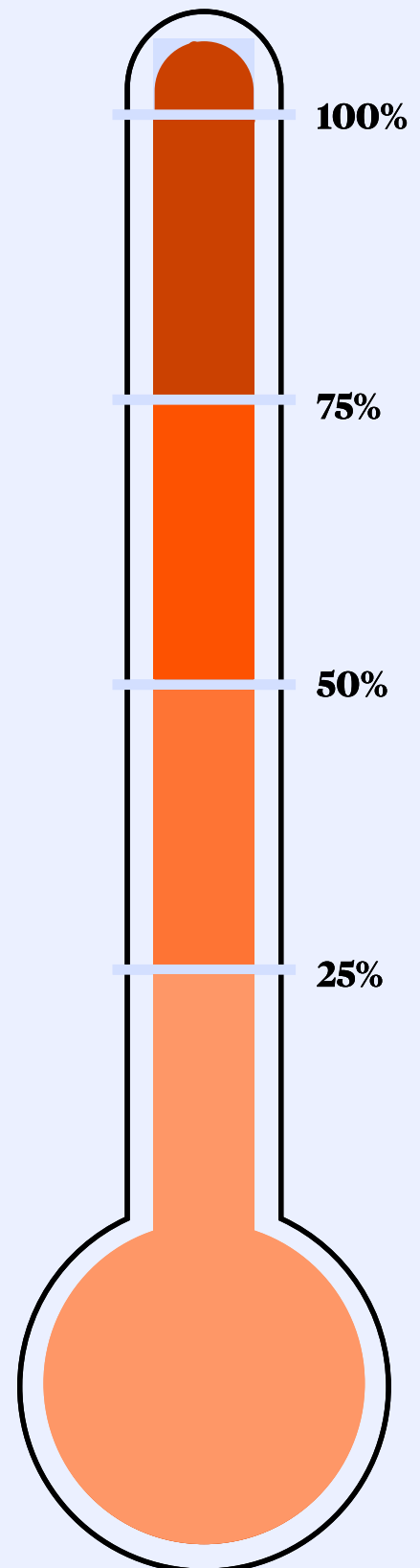
Solicit Feedback

- Quick post-enrollment survey templates.
- Apply insights to next year's strategy

Keep the Momentum Going Year-Round

- Strategies to keep benefits top-of-mind post-enrollment.
- Promote Healthee as an ongoing resource for employee questions and support.

Successometer



Part 6: Insights from Healthee — Thought Leadership and Innovation

The Future of Benefits Navigation

- The role of AI and data-driven tools in enhancing HR workflows.
- How Healthee empowers HR leaders to deliver personalized, high-impact benefits.

Healthee Spotlight on Healthee's VP of People

Debbie Sharvit is the VP of People at Healthee, leading people strategy, culture, and innovation. She's passionate about using tech, AI, and empathy to build better workplaces and elevate the employee experience.



Exclusive insights directly from Debbie

"Every OE season is different — and that's a good thing. It means we're listening and adjusting based on what our people actually need."

Want a smoother OE season?

[**Book a Healthee consultation**](#)