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Strategic Open Enrollment: Building Benefits That Engage, Empower, and Deliver Results

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FINDING
THE BEST
FIT

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Master Open Enrollment by Avoiding 5 Common Mistakes

Session 3 of 3

Welcome & Overview

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Agenda

1. Top 5 Mistakes

2. Actionable Plan

3. Final Tips & Wrap Up

Common Mistakes

Mistake #1: Not starting early enough — waiting until the last minute.

- Competing priorities – HR teams juggle recruiting, payroll, compliance, and more.

- Underestimating time – They think open enrollment is a quick task.

- Limited bandwidth – Small teams, big workloads.

- "Same as last year" mindset – They assume no changes will happen.

- Lack of a clear timeline – No project plan means no early action.

Common Mistakes

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Mistake #1: Not starting early enough — waiting until the last minute.

1 **Start early — 3 to 6 months ahead**

- Begin planning at least **90–180 days** before your enrollment window.
- Build a timeline with key milestones: plan review, carrier renewals, communication drafts, manager training, and employee meetings.

2 **Review plans & data early**

- Analyze last year's enrollment trends, employee feedback, and claims data.
- Meet with your broker or benefits advisor to explore cost-saving options or plan design changes.

3 **Get executive buy-In upfront**

- Get leadership approval for any changes to benefits or budgets early so you're not waiting for sign-offs at the last minute.

4 **Schedule back-up time**

- Build in buffer time for unexpected delays — carrier approvals, legal reviews, or last-minute questions

Common Mistakes

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Mistake #2: Lack of employee education (assuming employees understand their benefits).

Why?

- Not enough time

- Assuming people already know

- Limited resources & budget

- Managers are left out

Common Mistakes

Mistake #2: Lack of employee education (assuming employees understand their benefits).

1 **Build a communication plan & start early**

- Draft clear, plain-language materials and FAQs

- Plan multiple touchpoints: emails, webinars, Q&As, and 1:1 support

- Kick off benefits education before open enrollment

- Use multiple channels & keep it simple

- Repeat reminders

2 **Train your team & managers**

- Make sure managers know what's changing and how to answer employee questions

- Schedule time for HR or benefits partners to be available for live help

3 **Gather feedback**

- Survey your employees for feedback post-open enrollment so you can work on improvements for next year

Common Mistakes

Mistake #3: Inadequate technology/tools support (relying on last year's materials).

Why?

- Budget constraints

- Change is hard

- Lack of internal expertise

- Time crunch

- Outdated materials

Common Mistakes

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Mistake #3: Inadequate technology/tools support (relying on last year's materials).

1 Update all materials & make resources readily available

- Make sure your tools – from benefits flyers & employee booklets to cost calculators & comparison charts – are current

- Make sure employees have easy access to all benefits resources to help employees make informed choices

2 Test your enrollment systems

- Test your enrollment platform before launch

- Fix glitches early to avoid headaches when employees log in

Common Mistakes

Mistake #4: Not verifying compliance and eligibility.

Why?

- Complex rules

- Assumptions from last year

- Relying on manual processes

Common Mistakes

Mistake #4: Not verifying compliance and eligibility.

1 Review eligibility rules every year

- Check who qualifies and who doesn't
- Confirm whether any plan changes affect your population

2 Use technology or your benefits partners to automate eligibility checks and track compliance tasks

- Eliminate the need for keeping track of multiple, scattered spreadsheets

3 Communicate clearly with employees

- Clearly communicate what's different or new this year
- Be clear about what documents may need to be provided during open enrollment, like proof of dependent status
- Provide required notices and deadlines for completing open enrollment

4 Consider a compliance check-in with your broker, consultant, or legal team

- A quick audit can catch issues before they become expensive mistakes

Common Mistakes

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Mistake #5: Poor tracking of enrollments and issues

Why?

- Outdated systems & manual processes

- No clear ownership or process

- Poor communication channels

- Limited follow-up

Common Mistakes

Mistake #5: Poor tracking or enrollments and issues

1 Use modern technology

- Use a good benefits enrollment platform with real-time tracking and dashboards
- Enable automated reminders for employees who haven't finished
- Provide clear status reports for HR and brokers to monitor progress

2 Define clear roles

- Assign specific people or teams to monitor enrollment daily
- Set up a clear escalation plan for unusual issues

3 Improve communication

- Use multiple channels: emails, text alerts, manager reminders
- Have a clear, single point of contact for questions
- Offer live Q&A sessions during open enrollment

4 Schedule follow-ups

- Run regular reports to see who hasn't enrolled yet
- Reach out directly — don't wait until the deadline passes
- Confirm enrollment completion and send final confirmation notices to employees

Creating an Actionable Enrollment Plan

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Timeline &
milestones

Roles &
responsibilities

Feedback loops
& escalation

Post-enrollment
review

Final Tips

- Tools checklist

- Post-enrollment feedback

- Continuous improvement mindset

Thank You!

- Wrap up
- Next Steps