

# Businesssolver's Annual Enrollment Back to School Guide

It's time to sharpen those no.2 pencils, grab that lunchbox, and hop on our Annual Enrollment school bus! It's a brand-new school year, and to help you with those AE jitters, we pulled together a helpful checklist to get you ready for the first day. Follow our AE back-to-school guide to strengthen your preparation and to make enrollment season more successful:



**Actionable Steps to Prep for AE**



**Communication Techniques to Engage Employees**



**Vendor Management Tips**

## LESSON PLAN

It's never too late to start prepping



### Get there before the bell

Mark your calendars and start ramping up to align new vendors as early as you can in order to have a set strategy in place before summer even begins.



### Get your classroom ready

Your communication strategies should be as engaging as your classroom walls, so start personalizing your benefits messaging for maximum engagement. Make employee communications motivating and easy to understand, with a strong call to action. Be sure to consider communication preferences for print, digital, and mobile.



### Review your class schedule

We understand summer vacation can break good habits, so be sure you start off right with ongoing monitoring to test enrollment systems, updates to plan/premium and payroll deductions, and ensuring effective communications with vendor partners.

## CHALKBOARD ETIQUETTE

Engage your audience with clarity



### Use a Thesaurus

Two-thirds of employees say that reading about their benefits is complicated, long, or stressful<sup>1</sup>. Employees most often name "simpler language" and "more options" as things they'd change to improve their benefits enrollments. Ditch that complex HR terminology and try communicating in layman's terms.



### Digitalize your lesson plans

44 percent of employees say they wish enrollment was like shopping on Amazon.com, with the ability to easily compare plans<sup>1</sup>. Try integrating mobile applications and online enrollment technology so employees can enroll in their benefits whenever/wherever they want.



### Set time for parent/teacher conferences

73 percent of employees still prefer talking with a live benefits professional by phone<sup>2</sup>. Try a combination approach to communication with short videos for introductory information to free up more time for upper-level in-person conversations.

## MEET IN THE TEACHERS' LOUNGE

Regroup in-person



### We're all in this together!

It's always better to work the AE school year with an amazing team. Invite your vendor partners onsite to your office for an in-person training session to align everyone on AE strategy and messaging.

## CLASS IS IN SESSION



Like students on the first day of class, your employees are counting on you to inform them and help them pick the right benefits for their lifestyle. If they feel supported and successful, the AE is successful. Focus on employees — convenience, ease, health, and financial support for them and their families — not processes or products. AE is a learning experience, so don't forget to ask questions and listen to your employees' needs.

With the rapid expansion of technology, there are a lot of tools at your disposal to help strengthen your digital AE strategy. Emails, PDFs, and online video tutorials can help you communicate faster and more effectively with your employees.