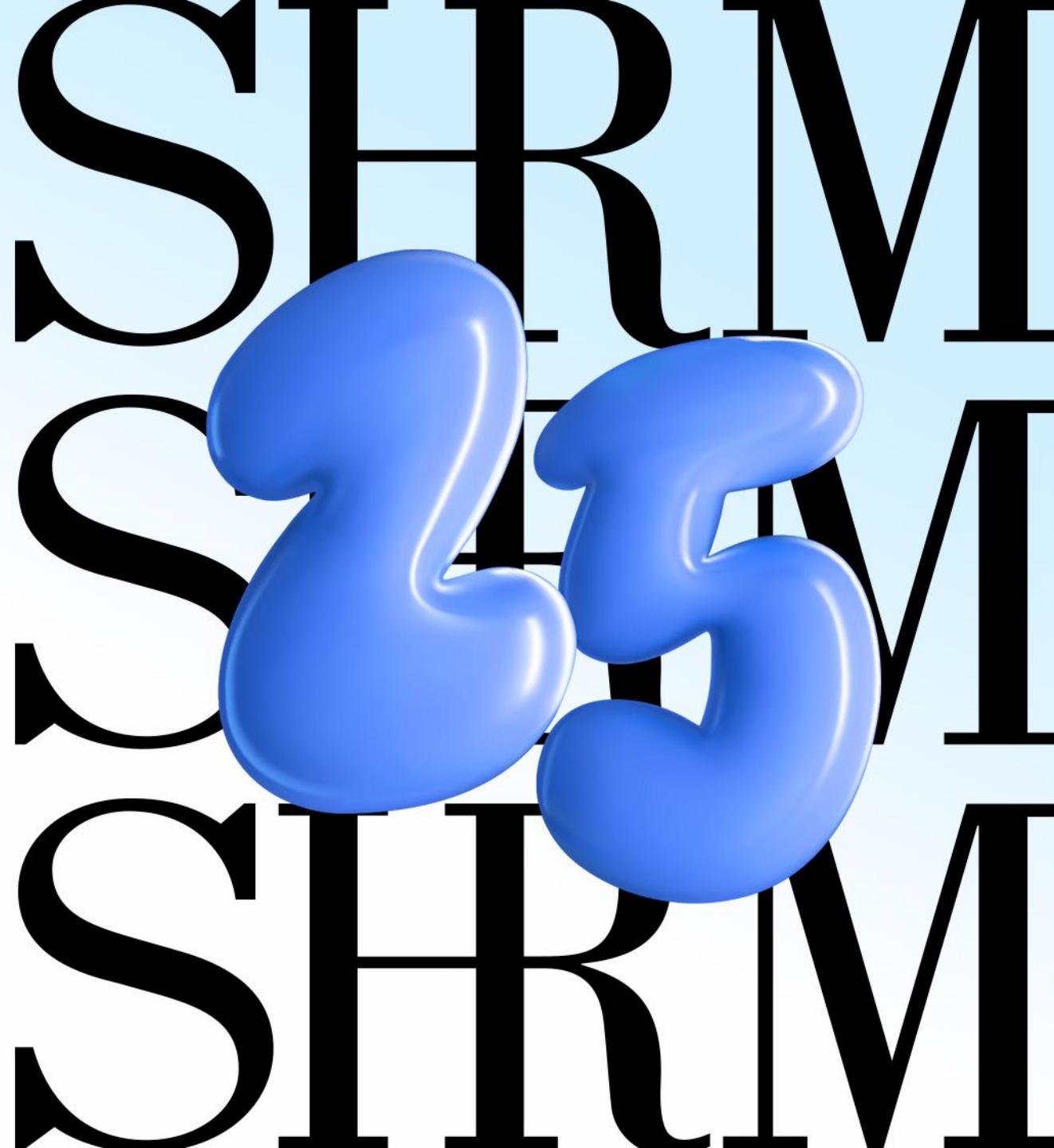


# **Beyond Benefits Open Enrollment:**

## **Achieving Sustained Engagement**



# LAUREN WINANS

## Principal HR Consultant

- Nearly 25 years of HR and employee benefits experience
- Former senior HR leader at General Nutrition Centers, American Eagle Outfitters, and CONSOL Energy, as well as part of the National Accounts division at Highmark Blue Cross Blue Shield
- Insights have been featured in several media outlets such as BBC News, CNBC, Forbes, USA Today, US News and World Report, NBC News, and The Washington Post.





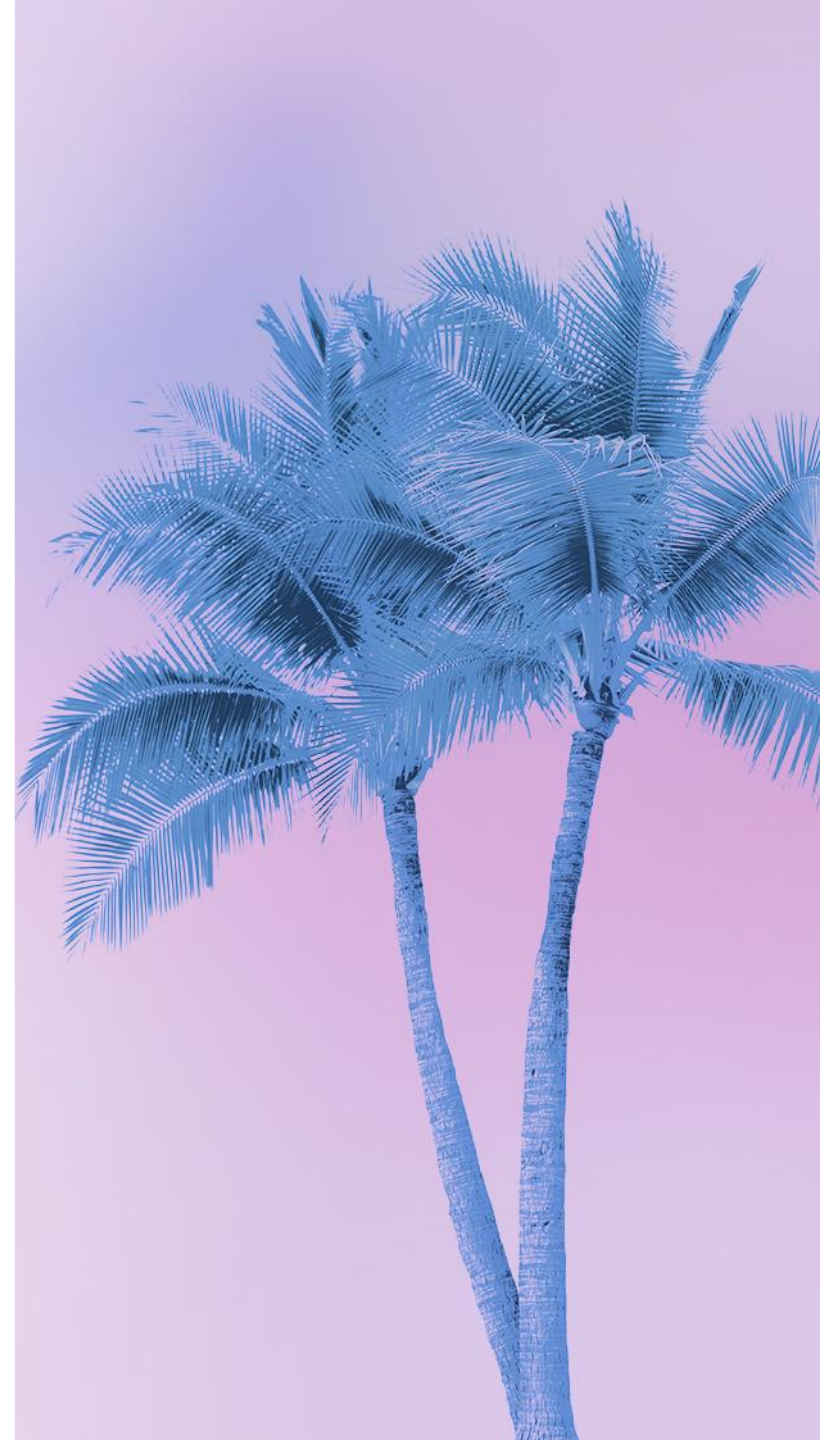
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# WHAT WE'LL COVER

- Barriers to Benefits Engagement
- Developing a Solid Engagement Strategy
- Get Your BEST Score
- Engagement Best Practices
- Communication – What, When, and How
- Measuring Effectiveness
- Key Takeaways





# BARRIERS TO BENEFITS ENGAGEMENT

- × Complex Language
- × Lack of Relevance
- × Communication Overload
- × Frequency Fatigue
- × Limited Understanding
- × Ineffective Communication Channels



# Does your organization have a Benefits Engagement Strategy?



# DEVELOPING A SOLID BENEFITS ENGAGEMENT STRATEGY

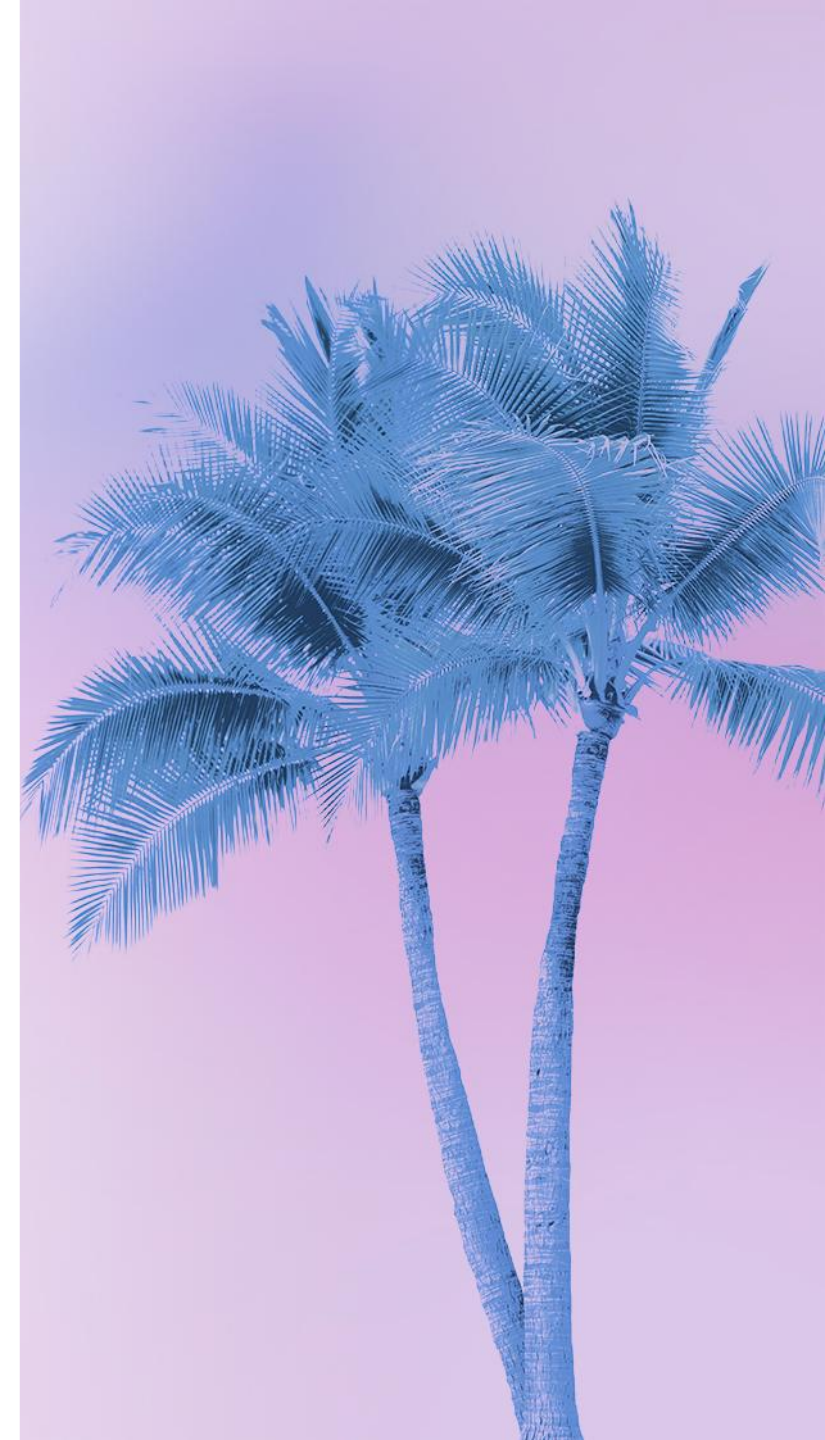
- Identify strategic goals and areas of focus
- Assess current practices and how they are being perceived by employees
- Integrate **best practices** into what you are doing today
- Create a robust and relevant **communications** calendar
- Solicit the support of leadership and peers



# Get Your BEST Score

- Scan QR code
- Click on link in banner at the top of the screen
- Answer questions and get your score
- **CLICK SUBMIT**
- Check your email for your score, recommendations, and an Engagement Strategy Checklist

Benefits  
Engagement  
Strategy  
Tracker







# What is your **BEST** Score?



# 8 BEST PRACTICES FOR SUSTAINING YEAR-ROUND ENGAGEMENT

1. Engage employees directly to determine which benefits matter most to them.
2. Develop a communications calendar outlining when and how you'll share information about benefits.
3. Aim to excite employees about their benefits without overwhelming them.
4. Utilize diverse channels beyond emails to reach employees.

# 8 BEST PRACTICES FOR SUSTAINING YEAR-ROUND ENGAGEMENT (CONT.)

5. Leverage technology and other tools to convey benefit information.
6. Regularly evaluate the effectiveness and competitiveness of benefits offerings to adapt to changing employee needs.
7. Prioritize employee health and well-being by ensuring that benefits meet the diverse health needs of employees.
8. Establish a consistent benefits experience across different markets or locations.



# COMMUNICATING INFORMATION THAT MATTERS

## IMPORTANT PROCESSES

- Enrollment
- Life event
- Checking provider network status
- Getting a prescription filled

## COST-SAVING OPPORTUNITIES

- Proper site of care
- Mail-order prescriptions
- Advantages of spending accounts
- Leveraging EAP

## EDUCATIONAL MATERIAL

- Retirement planning
- Using cost estimate tools for medical services
- Contact info for benefits, claims issues, and authorizations

## DEADLINES

- Last day to use spending account dollars
- End of the plan year
- Last day to earn credit for wellness activities
- Use-it-or-lose-it PTO

## FREE STUFF

- Preventative services
- Workplace perks
- Professional development
- Company-paid life insurance and disability benefits

# SHOWCASING LESSER-KNOWN BENEFITS

<b>Inclusive Medical Services</b>	<ul style="list-style-type: none"> <li>• Autism</li> <li>• Transgender</li> <li>• Fertility</li> <li>• Specialty drug coverage</li> </ul>
<b>Medical Provider Network Representation</b>	<ul style="list-style-type: none"> <li>• LGBTQIA+ Trained/Certified</li> <li>• Ensuring appropriate access regardless of location</li> </ul>
<b>Counseling/Mental Health</b>	<ul style="list-style-type: none"> <li>• Those available outside of the medical plan</li> </ul>
<b>Lifestyle Spending Account</b>	<ul style="list-style-type: none"> <li>• Lifestyle Spending Account</li> </ul>
<b>Caretaking Support</b>	<ul style="list-style-type: none"> <li>• Caretaking Support, i.e. childcare and eldercare subsidies and support services, flex schedule options</li> </ul>
<b>Financial Benefits</b>	<ul style="list-style-type: none"> <li>• Financial Planning &amp; Education</li> <li>• Student Loan Repayment</li> <li>• Education Assistance</li> <li>• Transportation Benefits, i.e. public transportation discounts or pre-tax purchases, free parking</li> </ul>



# COMMUNICATING WHEN IT MATTERS

Align messaging to the natural flow of the calendar year, for example:

- January – new plan year, awareness of proper sites of care
- April – scheduling summer PTO in advance
- May – mental health benefits, using EAP
- October – open enrollment, make a plan for unused spending account dollars





# USING VARIOUS CHANNELS TO MAXIMIZE IMPACT

- Explore different communication channels, including options through existing vendors
- Develop personas for insight into assumed communication methods
- Ask employees how they prefer to receive benefits information
- Leverage technology to simplify access to information, i.e. dashboards, push notifications, virtual assistants, etc.



# MEASURING EFFECTIVENESS

- Review utilization reporting
- Assess metrics like open rates, clicks, and views
- Analyze behaviors
- Conduct benefits surveys
- Monitor results on a quarterly or bi-annual basis, leveraging insights to make changes to upcoming year's engagement strategy

# KEY TAKEAWAYS

- Overcome barriers to engagement by building a solid engagement strategy.
- Revisit and evolve the strategy each year with support from leadership and peers.
- Master the content, timing, and method of communication to catch and maintain employees' attention.

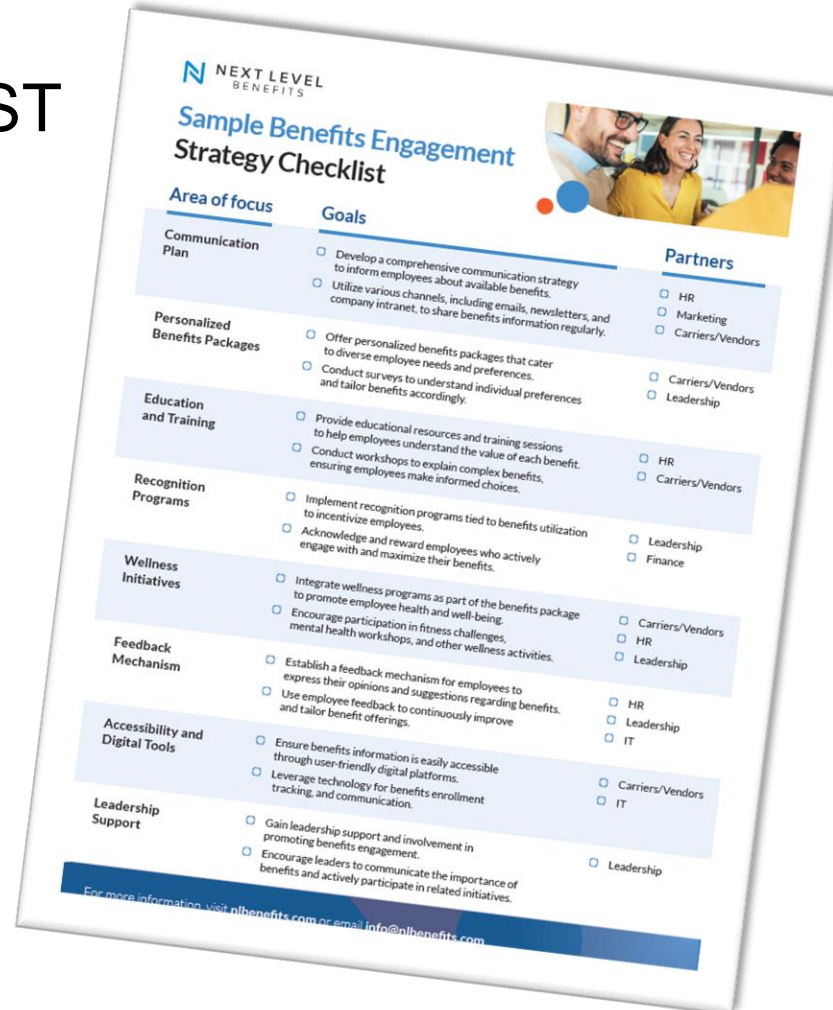




# KEY TAKEAWAYS (CONT.)

- Leverage your BEST score and our checklist to guide strategy development and evolution

Checklist included within  
BEST Score email and via  
download at [nlbenefits.com](https://nlbenefits.com)



# Q&A

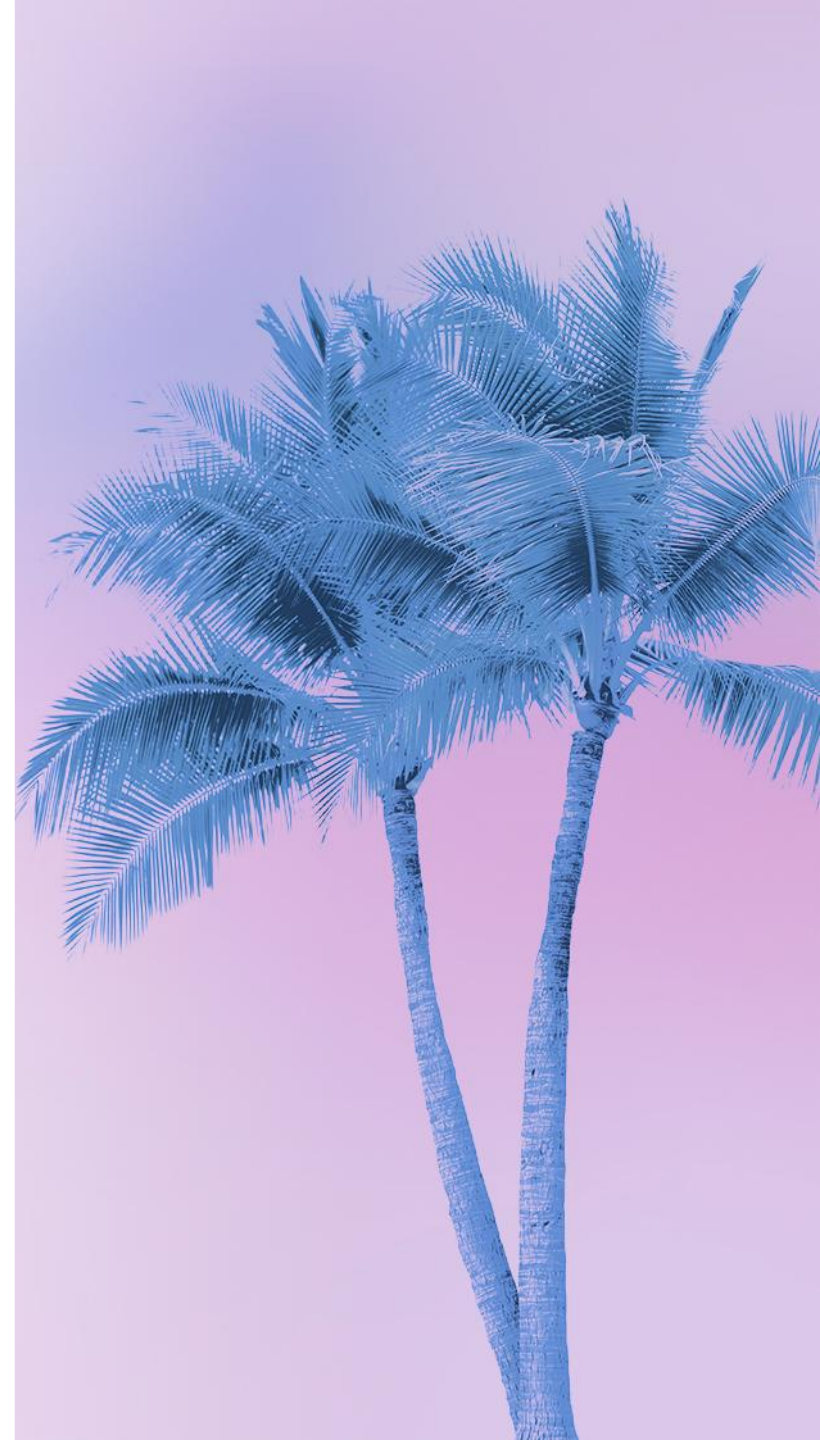
**In-Person?** Raise your hand!

**Attending Virtually?**

Type your question into the chat.

**Rather speak 1 on 1?**

Email me at [lauren@nlbenefits.com](mailto:lauren@nlbenefits.com)





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