

# BUSINESSOLVER®'S ANNUAL ENROLLMENT TRAINING PLAN

10 'BENEFITNESS'<sup>SM</sup> TIPS TO SURVIVE  
THE 10 TOUGHEST DAYS OF THE YEAR



Welcome to Annual Enrollment season – the 10 or so most difficult days on an HR/benefit pro's calendar! Follow our 10-step AE training plan to strengthen your preparation to make enrollment season more successful: communication techniques to engage employees, vendor management tips, and a checklist to get it all done on time.

## ENGAGE YOUR CORE (AUDIENCE)



### Break down each exercise.

89% of employees pick the same benefits year over year because they don't understand options.<sup>1</sup> Use plain English, not jargon, to help improve understanding.



### Plank with print.

Three-quarters of employees prefer printed enrollment information.<sup>2</sup> To meet the need, set aside room in your AE budget to account for printing/mailling costs.



### Work on mobility.

Stretch into mobile-enabled websites and apps to improve employees' benefits engagement and access to reach the one-quarter employees that prefer benefits information via mobile.<sup>3</sup>



### Strengthen security.

Ensure mobile-accessible data is PIN, password and/or touch-ID protected to secure Social Security Numbers and protected health information.

## STRENGTHEN AGILITY AND FLEXIBILITY



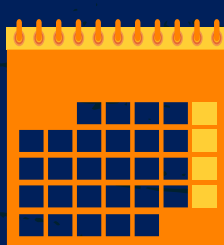
### Balance messages.

Work to strike the right "tree pose" of medium and message: Make employee communications motivating and easy to understand, with a strong call to action – while also meeting communication preferences for print, digital, and mobile.



### Work out early.

No rest for the weary! For next year, start ramping up to align new vendors as early as January, and have a set AE strategy in April.



### Build routine and repetition.

Set solid AE habits, including ongoing monitoring to test enrollment systems, update plan/premium updates and payroll deductions, and ensure effective communication with vendor partners.

## ROW IN SYNC



### Practice with training partners.

It's always better to work out with a buddy: Invite your vendor partners onsite to your office for an in-person AE training session to align everyone on AE strategy and messaging.

## Focus on the FINISH LINE

While AE puts the HR/benefits team in the company spotlight, never forget that at the end of the day, enrollment is about your employees. If they feel satisfied and successful, then AE is successful. Focus on employees – convenience, ease, health and financial support for them and their families – not process or products. Be sure when AE closes, you've effectively answered the WIIFM (What's In It For Me?).

DON'T FORGET:  
**TRAIN  
CONSISTENTLY!**

Even after AE is over, there is no down time in benefits anymore! The rapid pace of technology, communication, and benefit plan innovation all make your work a year-round effort. Staying engaged and up to date with your training efforts will make Annual Enrollment easier year over year.

 **businessolver**



Learn more AE training tips: View our webinar,

**"Annual Enrollment Boot Camp: Quick-Hit Strategies to Boost Your Benefitness."**

1. Aflac Workforces Report, 2015.

2. LIMRA, 2016.

3. Prudential, 2016.