

A JELLYVISION PLAYBOOK

Virtual Open Enrollment Made Easy



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Introduction

It's 2020, and whatever we considered "normal" went out the window a long time ago. And with open enrollment season on the horizon, now is the time for HR teams to start thinking about how to adapt. Much of the workforce will likely still be remote this fall, which means your tried-and-true employee engagement strategies won't work this year. Say goodbye to the office-wide benefits presentations and stacks of paper handouts—open enrollment is going virtual.

If you don't feel ready, you're not alone. According to a [recent study](#), employers rank low when it comes to open enrollment preparedness this year, with an overall readiness score of 33/100.

Coming up with a whole new approach may feel daunting—you had open enrollment down pat! But don't worry. Engaging and educating employees on your benefits offerings can be just as effective with a virtual strategy. In fact, many employers have been using virtual open enrollment tactics for years because they've found it to be more efficient—and effective—than communicating in-person.

So how can you make sure this year's virtual open enrollment is a success? Let's take a look at two different strategies: the Do-It-Yourself approach and the ALEX approach.



The Do-It-Yourself Approach

Let's start with the basics. Spreading the word about open enrollment doesn't have to be complicated, and there are a variety of channels at your fingertips to engage and educate employees virtually. The more channels you use, the better—you never know what's going to resonate with employees, and finding them where they are is the name of the game.

Here are six basic tools to use, plus four ideas that are a bit more out-of-the-box.



Basic virtual communication tools:

- ✓ Three-part email campaign
- ✓ Open enrollment cheat sheet
- ✓ Benefits FAQs page
- ✓ Benefits guide
- ✓ Virtual office hours
- ✓ Benefits webinar or video conference

Bonus ideas:

- ✓ Postcards
- ✓ Intranet ads
- ✓ Text messaging
- ✓ Virtual benefits fair or town hall

Basic Virtual Communication Tools

Three-Part Email Campaign

If you're like most HR pros, you're likely using email already to spread the word about open enrollment. But since you won't be able to rely on in-person open enrollment meetings, email will carry more weight than usual this year.

Since you won't be able to rely on in-person open enrollment meetings this year, emails will carry even more weight. Breaking up your messages into multiple emails will make it easier to share information in digestible pieces, and will provide employees with much-needed reminders to take action along the way.

Here's one example of a three-part email campaign you could send. For more ideas, check out this three-email sequence we've made to help our customers promote ALEX.

[Download the email templates](#)

Email #1	When to Send	What to Include
	Before your company-wide benefits webinar	<ul style="list-style-type: none"> Open enrollment will be starting soon Start and end date Announce that you'll be hosting a company-wide benefits webinar to review what benefits are available, what's new this year, and how to enroll in benefits Information about how and when to access the webinar Who to contact with questions
Email #2	When to Send	What to Include
	At the start of open enrollment	<ul style="list-style-type: none"> Announce that open enrollment has begun Reminder about the last day to enroll Attach any presentation decks or other information that was included in your benefits webinar Link to where employees should begin enrollment
Email #3	When to Send	What to Include
	Three days before open enrollment closes	<ul style="list-style-type: none"> Open enrollment closes in three days Reminder about the consequences of missing the enrollment cut-off Who to contact if they need help making benefits decisions or completing their enrollment

Open Enrollment Cheat Sheet

Email campaigns are a great place to start, but a long, text-only email might make your employees' eyes glaze over. Create a more visually appealing one-page PDF to promote your most important benefits resources and provide employees with a cheat sheet while they're enrolling.

What should your cheat sheet include? We got you started with an **open enrollment overview template**. Highlight what's changed since last year, offer helpful tips, and show employees where to enroll all in one place. Just download the template, fill in the blanks, and hit send!

[Download the template](#)



Benefits FAQs Page

Even if your open enrollment communications plan is perfectly executed, employees are going to have questions. And answering those questions is going to take up a lot of your HR team's time.

An easy-to-digest Benefits FAQ webpage (or handout) is a great place for employees to turn before asking a real live human for help.

How to make your FAQ page successful

- ✓ Aim for no more than 15 questions. You don't want to overload people.
- ✓ Phrase questions and answers naturally, so they reflect how you'd speak with employees in person. No jargon allowed.
- ✓ Make sure to address COVID-related items this year.
- ✓ To get ideas for the best questions to include, poll your workforce in advance.
- ✓ Email it, put it on your company's intranet, and reference it in any other benefits presentations you may have.



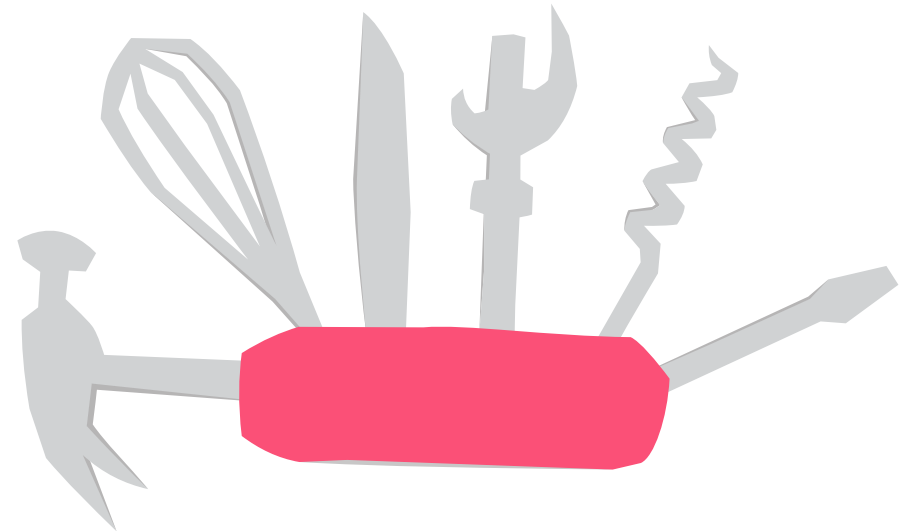
Benefits Guide

An annual benefits guide might be a mainstay for you. It might usually take the form of a printed packet handout, but this year, think of it as a digital asset first. Instead of printing and shipping a physical version to every employee, save or reallocate that budget to other, more pressing matters.

It's also important to remember that with the current state of the world, last year's guide will probably need some work before you can send it out again. Here's how to dust off your standard benefits packet so that it's as relevant and helpful as possible in the COVID-19 era.

Tips for creating a stand-out virtual benefits guide

- ✓ If you're able, ask a graphic designer for help with the layout. A text-only Word doc might put some folks to sleep, and they'll miss out on important information.
- ✓ Put all the big news up front. Make sure it's brief and easy to scan.
- ✓ Add a COVID-related section to address anything unique to this year.
- ✓ Link to other enrollment materials, like how-to videos and FAQ pages.
- ✓ Include step-by-step instructions on how to enroll, complete with screenshots.
- ✓ Add any additional resources that your benefits providers offer, like online portals or more detailed one-pagers.
- ✓ List who to contact with benefits-related questions.

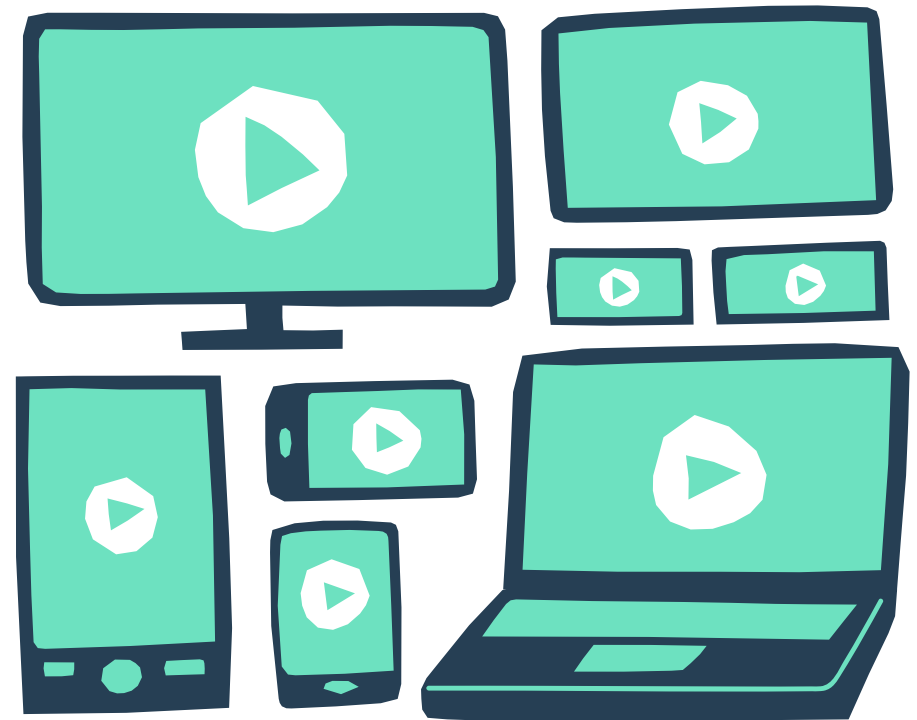


Virtual Office Hours

Working from home doesn't mean you can't invite employees to swing by your virtual "desk" to get some one-on-one benefits guidance and advice. Virtual office hours are a great substitute for the real-life interactions you'd usually have during open enrollment.

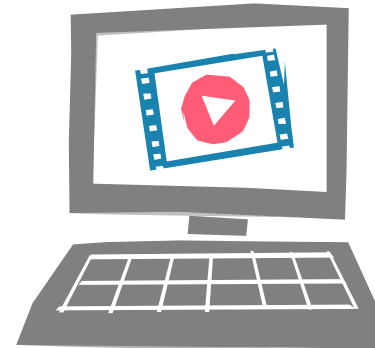
Tips for virtual office hours

- ✓ Establish a window of time over a few days where you or your team will be available to answer individual questions.
- ✓ To be truly helpful, make yourself available by telephone, video teleconferencing (like Zoom), chat software (like Slack), or email. Basically, be reachable by whatever method employees like best.
- ✓ Set employees' minds at ease that they'll have your undivided attention and won't get interrupted. Tools like Calendly make it easy for employees to schedule an individual time to chat with you.



Benefits Webinar or Video Conference

Chances are, you usually kick off open enrollment season with an all-company benefits meeting or town hall. A good replacement? A benefits webinar or video conference that runs through enrollment basics and allows for a virtual Q&A.



Choose a platform.

Your company is likely already using some sort of virtual meeting software, like [Zoom](#), [Google Meet](#), [ClickMeeting](#), [Webex](#), and [GoToMeeting](#). Whatever you're used to will work here.

Keep it short.

Aim for 30 minutes maximum. Studies show that [virtual meetings are mentally taxing](#), so the shorter the better.

Record it.

Record your meeting so that employees can go back and review it later. The ability to record is a standard feature of many webinar/video teleconference software providers, so check and see if it's included with the service you use.

Do a demo.

If there are online tasks you anticipate people struggling with, walk them through it live during the presentation.

Make it easy to ask questions.

Save a portion of the presentation time for audience questions. Let employees submit questions via a Slack channel or the video conferencing chat, and assign a moderator to filter through the responses and pose questions live on the call.

Bonus Ideas

More communication is always a good thing. If you're looking to go the extra mile, here are some other big ideas for employee engagement. They might involve a bit more legwork, but could also be just the thing you need to really catch your employees' attention.

Postcards

In a world dominated by digital communication, you may find that an old-fashioned 3x5 postcard is a great way to grab your employees' attention—at a fraction of the cost of a full benefits guide.

A few tips

- ✓ You don't want your postcard to end up in the recycling bin unread, so make sure your company's name and logo are visible on the front and back of the card.
- ✓ Focus on a single message, and provide URLs for more info. A postcard doesn't give you a lot of space, so concentrate on simple ideas like important dates or clear calls to action (like "Enroll in benefits at [www.example.com](#)").
- ✓ If you can, include the name of employee spouses in the address section. It's inclusive, and a person's spouse just may be the benefits decision maker for the household.
- ✓ Make sure the design of your postcard is in line with United States Postal Service [requirements](#). To be super safe, use a vendor who has experience with sending direct mail.

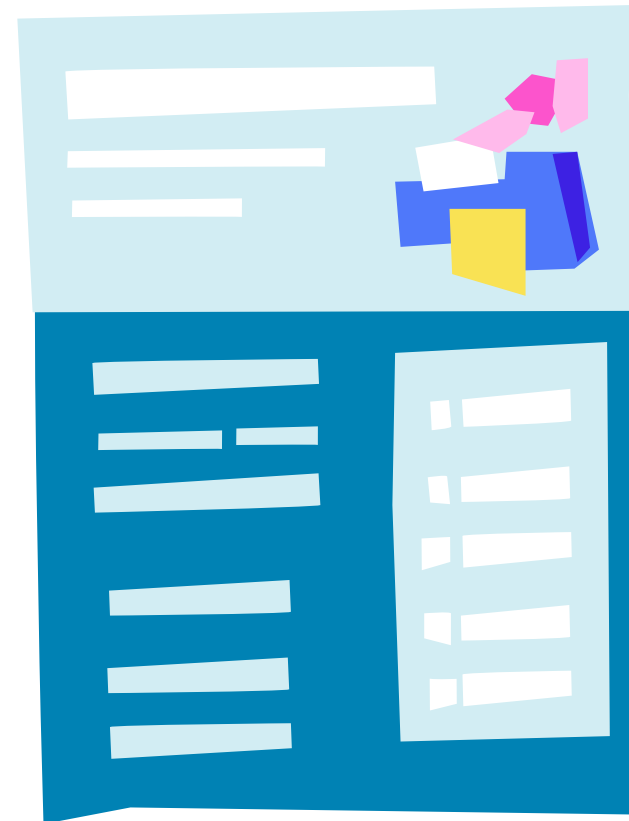


Intranet Ads

Do your employees visit your benefits portal or company intranet regularly? If so, create a few banner ads to remind them of upcoming deadlines and to-dos. Think of them as tiny virtual road signs.

Tips for making intranet ads

- ✓ Repetition can also apply to imagery. When making intranet ads, reuse the same themes, motifs, and imagery from other visually-driven communication (benefits guides, postcards, etc.).
- ✓ You can make intranet ad content with free tools like [Canva](#), [Snappa](#), and [DesignBold](#).
- ✓ Make sure your ad has a strong “call to action.” A call to action is what you want your employee to do (“Attend the webinar.” “Enroll today!”)



Text Messaging Campaign

Text might not be the first channel you think of when it comes to benefits communication, but it's worth a second look. People love their mobile devices, and SMS open rates ([around 98%](#)) tend to kick the stuffing out of email open rates.

Pick a platform.

Don't know where to begin? Start your search with the following vendors: [Text Request](#), [Simple Texting](#), [Trumpia](#), and [TextUs](#).

Ask permission.

Prompt employees to opt in to receive text messages from your company. Not only is it polite, but in most places, it's the law.

Keep it short.

SMS demands brevity. The best-performing texts are around 140 characters in length.

Include a CTA.

Because text is so short, include links to other materials with more information—or ask employees to take one action.

Measure your impact.

SMS technology involves a lot more than just broadcasting messages to a wide audience. In fact, many SMS platforms include features like personalization, automation, AI-driven conversation, and analytics.



Virtual Benefits Fair / Town Hall

Even in the age of COVID-19, benefits-fair-style events are still possible with a little creativity and planning.

Traditional benefits fairs feature multiple providers and vendors in the same place to answer questions and walk through plans, so going virtual will require some coordination with stakeholders to make sure everyone can be in the same place at once. Here's how to make sure your fair is a success:

Keep the tech simple.

Don't let the technology confuse you. You can run a Virtual Benefits Fair using the same software as a benefits webinar ([Zoom](#), [Google Meet](#), [ClickMeeting](#), [Webex](#), [GoToMeeting](#), etc.). There are fancier tools out there, like [vFairs](#), but be wary about introducing yet another platform to your employees. Try to use what they already know.

Ask for help.

Don't be shy about asking your benefits broker to help coordinate scheduling to make sure all of your providers have a representative present.



Make it fun.

Think of surprising ways to drive engagement. Consider asking your CEO to kick it off. Include trivia questions about important benefits information to keep employees active. Provide incentives for attending. Some companies provide "wellness points" for attending events that can add up to premium reductions.

Keep it brief.

Instead of one long presentation, plan a schedule with multiple time slots so that folks can choose which sessions to attend. Think of each session as a "booth" at a benefits fair. Each rep will be manning his or her "booth" and answering the questions of whoever chooses to stop by.

Make ALEX the Center of Your Virtual Open Enrollment Plan

Okay, so that was the DIY method...doable, but a lot of work.

The stress-free way to run virtual open enrollment—and a more effective way to engage and educate your workforce—is to **make ALEX the centerpiece of your plan.**

What is ALEX?

Powered by behavioral science and proprietary technology, [ALEX](#) is a financial and benefit guidance software platform that helps your employees make smarter, wallet-friendlier choices about their health plans, retirement, and tax-savings accounts—and helps employers save money on premiums, payroll taxes and more. ALEX is available online 24/7 and can be implemented in a matter of weeks.

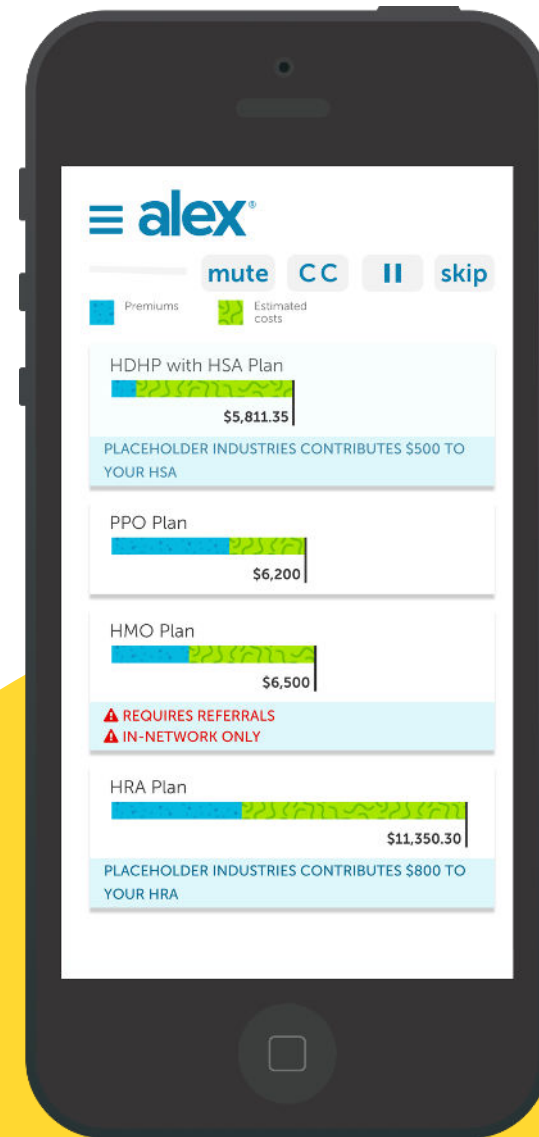


What does ALEX include?

Benefits Counselor

The heart of ALEX is Benefits Counselor, a one-on-one virtual conversation with an engaging benefits expert who actually talks to employees (with a real voice) and provides personalized guidance based on their individual needs and financial situation. Specifically, Benefits Counselor:

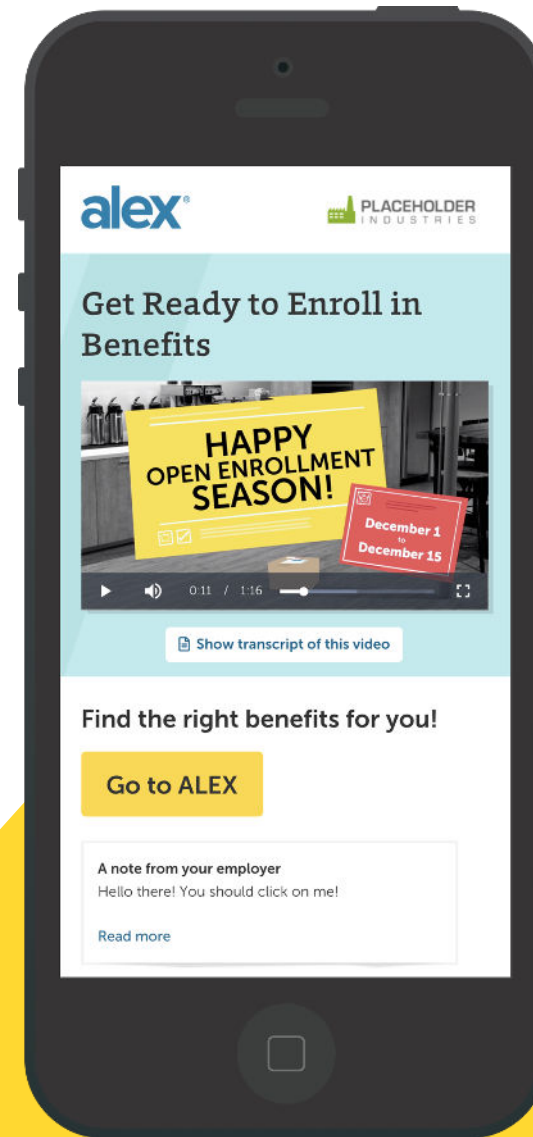
- ✓ Provides decision support for choosing health plans, 401ks, HSAs, FSAs, voluntary benefits, and more
- ✓ Shows side-by-side comparisons that let employees know which plans will give them the most bang for their buck
- ✓ Uses plain English and humor to present complicated concepts in a way that's easy to understand
- ✓ Is completely secure and confidential



Sneak Peek

Sneak Peek videos can help you announce your company's biggest benefits changes and important deadlines. We'll tailor your video to include the most relevant messages for your company, and offer employees a bite-sized, engaging look at what's ahead. Specifically, Sneak Peek can:

- ✓ Highlight the dates of your open enrollment period
- ✓ Help new hires understand their benefits
- ✓ Encourage employees to talk to ALEX
- ✓ Summarize the most important benefits changes of the year
- ✓ Announce company-specific initiatives, like your benefits webinar or virtual benefits fair



Marketing and Analytics

Remember how the DIY approach suggested that your team create lots of emails, one-pagers and guides to promote open enrollment? Jellyvision does all of that legwork for you. Our marketing and analytics platform—ALEX Central—includes a vast library of internal marketing resources for your HR team, including:

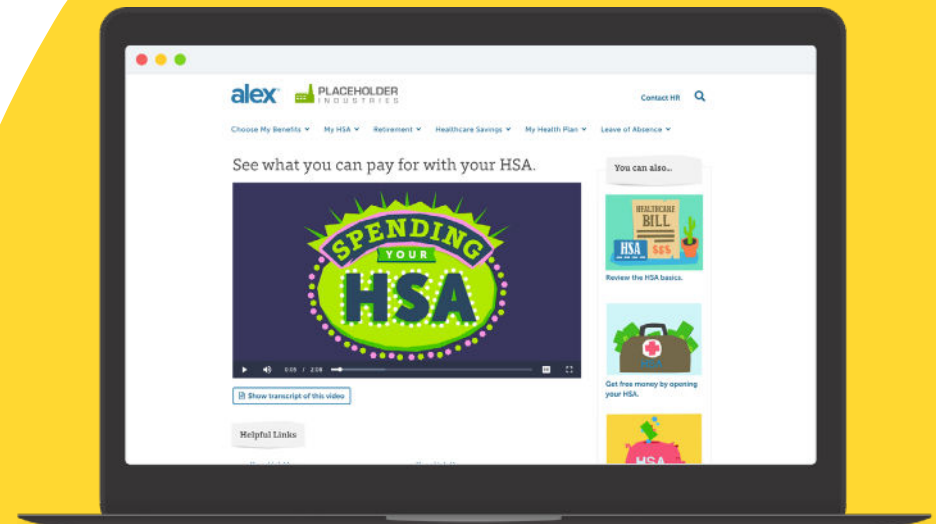
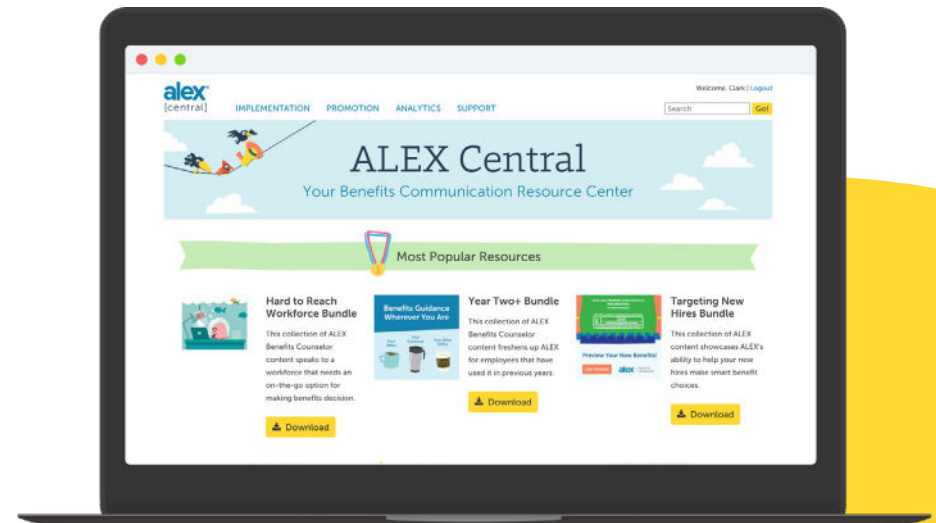
- ✓ Pre-written email campaigns that match your company’s enrollment style (active, passive, return user, etc.)
- ✓ Customizable templates for postcards, posters, and fliers
- ✓ Ready-to-use Internet ad content
- ✓ Plug-and-play language suitable for use in email, SMS, print, or website copy
- ✓ Hundreds of ALEX-branded images to complement and support your outreach
- ✓ Fun, custom Zoom backgrounds to spice up your virtual meetings

Homepage and Tips

Available with ALEX Complete

In addition to Benefits Counselor, Sneak Peek, and built-in marketing support, upgrading to ALEX Complete offers employers a library of Tips (short, animated videos that provide health care consumerism advice), a New Hire Sneak Peek video for onboarding, and the ability to customize ALEX for unique benefit plans. All these resources live on a single homepage that’s accessible with a single link.

To learn more visit jellyvision.com



ALEX Saves Time and Money

ALEX elevates and simplifies the open enrollment process by offering one-on-one benefits decision support without the administrative burden for HR teams—and delivers big financial outcomes for both employers and employees.

Eliminate the need for general info sessions

Because ALEX provides benefits guidance tailored for every person, HR teams can say farewell to printing costs and time-consuming benefits guides, town halls, meetings, and webinars. Added bonus? You'll have a lot more time for your high priority work.

ALEX saved one hospital

\$30K

annually on printing and mailing benefits guides materials



I don't think people coming out of the sessions we used to hold would have said they had a better understanding of their benefits. But with ALEX, 77% of our team members now say they understand their benefits better, and that to me is a huge win and a real measure of success.

Erin Miramontes

Senior Manager of Global Benefits
[Axiom Global, Inc.](#)

Save hundreds of hours of work

Because ALEX is so engaging and easy-to-understand, HR teams find they don't have to answer the same questions over and over, especially when things get complicated (like when there are new plans, or pandemic updates). This can eliminate the need for office hours, one-on-one consultations, and benefits FAQs. And because ALEX comes with tons of pre-made promotional materials, HR teams also don't have to spend time creating original assets—or paying outside vendors to do so.

Loyola University saved

120+ hours

a year in planning and organizing new hire orientation meetings



ALEX eliminated the need for my team to do a lot of administrative work and allows them to spend more quality time with employees, which is great.

Jane Standing

Manager, Leave of Absence Administration,
Stantec



There is no way we could reach all those people during open enrollment if we did it in person.

Amy Johnson

Principal Benefits Analyst, Medtronic

Drive meaningful financial outcomes

ALEX does more than just provide info about benefits. Because ALEX is unusually good at explaining the value of those benefits, employees make smarter decisions about which plans to choose, how much to save for health care expenses, or how to save for retirement—which ultimately saves money for them and your organization.

ALEX saved employees

\$422 million

by guiding them to the right plan for them in 2019.

ALEX saved employers

\$79 million

in payroll taxes by boosting employees' HSA, FSA, and 401(k) contributions in 2019.



ALEX helped deliver an excellent, excellent turnout. We were so impressed with the enrollment in the high deductible plan—that is extreme cost savings.

HR Specialist
Construction Services Firm

Boost engagement and understanding

ALEX’s proven formula of behavioral science, straightforward language, and well-placed humor helps your employees better understand their benefits and make smarter, more cost-effective choices—something even the best PowerPoint presentation or benefits guide on earth can’t do.

4 in 5

employees say ALEX gives them a better understanding of their medical plan options



of employees said ALEX helped them better understand the tax savings related to their benefits choices

Stay a step ahead of a changing world

Keeping up with changing benefits laws and guidelines is a challenge even in a “normal” year. Throw in COVID-19, and you’ll be spending hours editing (and re-editing) your benefits guide, information on your intranet, your open enrollment email campaigns...the list goes on.

That’s why ALEX is always adapting to new changes in legislation, revisions to your benefits plans, and even company-specific news—all in one place. That means a lot less research and updating resources for you, and a lot more information for your employees.

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There’s always this second-guessing with our employees that they’re choosing the wrong plan. The role ALEX plays for our employees is helping them feel confident in what they choose... and reducing the number of times they call on us and say ‘Just tell me what to do.’

Benefits Manager

Midwest state government organization

Source: [Warm, Fuzzy Feelings and Cold, Hard Data: Proof That ALEX Engages Employees and Drives Smarter Benefits Decisions](#)
Constantly updated to reflect a changing world

See ALEX for yourself.

For more ideas on how to make virtual open enrollment painless, get in touch with Jellyvision to schedule a demo of ALEX.

[Book a Demo](#)

About Jellyvision

Jellyvision is the award-winning technology company behind ALEX®, benefits and financial guidance software that talks people through complex, confusing, and snooze-inducing decisions related to their pay, their benefits, and their savings. ALEX turns daunting topics into delightful, actionable guidance with a calculated blend of subject matter expertise, behavioral science, and mighty tech. ALEX is trusted by more than 1,500 companies—including 114 of the Fortune 500®—that employ more than 18 million people with combined employee health insurance premiums exceeding \$115 billion.

Let's talk
alex®

