

# The third step of enrollment readiness: Process management



You've helped your clients [design their benefits plans](#). You've helped them [prepare for open enrollment season](#) at large. And while things have likely been in the works for weeks—now is when it really gets started.

As much as you've been working toward enrollment readiness, this period marks another critical component of enrollment season: process management. Read on for ways to help keep clients focused.

## 1) Share information with employees often.

Sharing information helps reduce confusion. And the open enrollment process can be plenty confusing—or worse—for enrollees. As a matter of fact, 22% of employees report being confused during open enrollment, 21% say they're stressed, and 20% report being anxious.<sup>1</sup>

Complementing your benefits communication and education plan with clear, easy-to-digest information throughout the enrollment period—explanations of benefits, where to go and what to do if an issue arises—can help your clients' employees start and end their enrollment process in a more relaxed manner. And the easier you make things for the employees, the easier you make things for your clients and yourself. Depending on your clients' needs, you can even provide them with document and email templates that outline what employees can expect during the enrollment process, and let your clients take it from there.

## 2) Maintain cadence of communications.

It's your clients' responsibility to prompt their workforce about open enrollment—but you can be an ally in keeping them on schedule. A quick email can remind clients to share the open enrollment time frame at large, to research and take action on any specific new offering, or even just to ask their benefits team a question earlier rather than later.

## 3) Evaluate systems for organizing data.

For every enrollee, there's data. And all this data needs to be organized in a cohesive manner. If your clients are using a human resources administration contractor to handle open enrollment, you and your client won't have to worry about this as much, as the contractor will take care of data management for you. If, on the other hand, your clients are electing to go for it themselves, it's helpful to have recommendations on how to develop a system for organizing the data. This isn't one of those things to develop on the fly. And if changes are necessary, it's easier to fix a boat's holes before people get in, not after.



#### **4) Establish a dedicated support system.**

Whether there's confusion about the difference between two benefit options or unexpected technical difficulties, having go-to people with go-to contact information for enrollment support can help alleviate stress.

#### **5) Stay connected with benefits team.**

Ideally, everything will go smoothly throughout the enrollment process. Simple, regular check-ins with the benefits team can help identify little things before they become issues and can also be the key to dousing emergency fires as they emerge, before they can cause damage.

<sup>1</sup> EBN. "Making employees more comfortable with open enrollment." Published 10.30.2019. Accessed [5.19.2021](#).

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