



Open enrollment survival guide

Feeling the stress of open enrollment season? It'll be here before you know it.

That means your team needs to reprioritize, your employees need to be fully informed and your systems need to be working properly. Are you ready?

Because no one wants the headaches you may have encountered in previous years, we've assembled these helpful tips to get you through open enrollment season.

10 survival tips for open enrollment season

1. Learn from last year's enrollment

It feels like so long ago! But ask yourself how your company fared during last year's open enrollment season. Remember the most commonly asked questions. Identify where the bottlenecks and inefficiencies were so you can eliminate them, ensuring that employees have the information they need to make decisions and plenty of time to do so.



2. Help employees conduct a cost/benefit analysis

Do your employees know how their benefits worked out last year? Were they a good investment? Did your wellness program lead to productivity improvements? For self-funded plans, did expenses align with expectations, or did surprises arise? Help employees answer these questions for themselves so they can make better decisions.



3. Encourage active participation

Employees shouldn't take their benefits for granted. Employ a strategy that requires them to actively select the plans and benefits they want, rather than just passively continuing with existing plans. Ask them if they're expecting any life changes that could create a coverage gap. This helps prevent panicked calls from employees who may have forgotten and missed the deadline, or who later realize they chose the wrong plan.



4. There's no such thing as too much communication

Communication is key — especially in a big organization. Using a multi-channel strategy ensures everyone gets the message that open enrollment season is coming, and that they need to take action. And, where possible, encourage a more personalized approach. Schedule one-on-one meetings with managers and leaders, and suggest they do the same with their own teams.



5. Keep an eye on compliance, but don't overdo it

Yes, healthcare can be complicated, and there are compliance-based communications you need to distribute in a timely fashion. Keep your eye on those, but don't lead your educational enrollment campaign with compliance-based materials. It will just confuse your employees. Treat your employees like you would a customer, someone you want to get interested in your services. Keep communications engaging, put employees' needs first, and make sure they understand any rules or laws they (and you) have to adhere to.



6. Test, test, test

We can't over-state how important it is to test all the systems that employees will use to sign up for or update their plans before open enrollment season begins. If the enrollment system or application doesn't work (or launch on time), this failure will be all your employees remember. A good idea is to test your tools (including Workday) on new hires. Do they see the proper items? Can your system handle job changes or life events (for example, marriage or children)? Are integrations working properly? This is especially important if this is your first open enrollment season on a new ERP, or if you're switching providers.



7. Form a focus group

It's a good idea to hold focus groups to make sure information has been communicated properly. Extend invitations beyond HR, so you hear from a good cross-section of employees and managers.



8. Lean on your peers and colleagues

You are not alone; HR professionals like yourself are also going through open enrollment season. Make use of community resources where you can get (and share) advice, trade stories and download helpful resources, like Workday's own [Open Enrollment Checklist](#).



9. Check your status

Within Workday, there is an Open Enrollment Status Report. Check it often to make sure everything is working — and to keep your employees on track. Worse than a stressful open enrollment season is dealing with unhappy employees who missed their deadlines.



10. Take a break and prepare a reward

Don't forget to take frequent breaks, lest you get too stressed. Find favorite music or snacks, and make use of your office's break room. (That's what it's there for!) And plan a reward for your team when the enrollment process is over. Take time to celebrate before you get back to business as usual.



IBM is here to help you survive open enrollment season. For more information about our Workday consulting services, visit ibm.com/workday.

