

# How to Make Employee Communications a Key Part of Your Benefits Strategy

**...During OE Season and Beyond**

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**Your guide** to creating a communications strategy that meets employees where they are and keeps them engaged when it matters most.

Ready to improve your employee benefits communications? **Let's go!**

**Benefitfocus**<sup>®</sup>



# Welcome!

**Clear communications can enhance every facet of modern life** – and employee benefits are one area where individuals may benefit the most from effective, actionable messaging. Benefits can be complex, personal and impactful, and successful communication leads to real results, with half of employees saying that...

- ✓ **They would feel more cared for** if their employer improved benefits communications.
- ✓ **A better understanding of their benefits** would **make them more loyal** to their employer.

**Here’s where the push-pull comes in.** Employees want (and need) targeted communication.



benefits-eligible working Americans want help from their employer to better understand the employee benefits they enrolled in throughout the upcoming year.<sup>1</sup>

Yet, HR teams may feel overwhelmed by where to begin when it comes to benefits communications.



**of managers say** they already juggle more responsibilities than they can handle.

While HR teams shouldn’t be expected to become expert marketers, employee communications should be a key part of your benefits strategy. **That’s why we’ve created this playbook you can use as your guide for:**

- ✓ **Building** a step-by-step strategic communications motion
- ✓ **Pro tips** for getting your communications strategy right
- ✓ **Considerations** for targeting your messaging

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Source:

<sup>1</sup>Based on the results of a Voya Financial Consumer Insights & Research survey conducted January 22-23, 2024, among 1,005 adults aged 18+ in the U.S., featuring 455 Americans working full-time or part-time.



## SECTION 1:

# Your Birds-Eye Annual Strategic Communications How-to Plan

**The best place to start** is a strategic communications plan, a framework you can reliably return to each year. The framework can be composed of steps like these shown in the outline below. The key is to dig into each step and determine what works best for your team.

## 1 Hold a Planning Session

**Holding an annual planning session is the first step** to developing an employee benefits communications strategy for the year – open enrollment season and beyond. Dedicating time to looking back at the year before and the year ahead helps enable you to determine what you'd like your employee benefits – and therefore, your employee benefits communications – to achieve.

### Who Should Be Involved?

Consider which individuals from your company would be the most helpful during your strategic benefits communication annual planning session. Do you want to keep it close with only your HR team? Or do you want to include a broader group of stakeholders?

For example, if you have a dedicated marketing team, consider inviting a team member for all or a portion of the session. As experts in communications, messaging and campaign management, they may be able to provide some insights or ideas.





## Questions to Reflect On:

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### Looking Back:

- ① **What went right** from your communications last year? What went wrong?
  - ① **What do your benefits** communications engagement analytics (e.g., opens, click-throughs, participation rates) look like?
  - ① **Did you experience** any “surprises” in plan enrollment that may be related to the quality or quantity of your communications?
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### Looking Ahead:

- ① **Are there new types** of content or communication channels that you should include in your strategy, like video or social media?
  - ① **Have there been any changes** to the maximum coverage or new benefit offerings that your employees need to be aware of?
  - ① **Are there new technologies** that you should consider using to reach your target audience, such as text messaging?
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### Best Practice:

Leave with concrete next steps and individuals assigned to each action item.

### Learn More:

[Plan Ahead Employee Benefits Enrollment & Engagement Playbook](#)

[Warm Up for OE Employee Benefits Enrollment & Engagement Playbook](#)

[7 Signs Your Employee Comms Aren't Driving Results](#)





## 2 Gather Information

Now that you've met as a team and set intentions and goals for your communications, it's time to gather some information from the people you're trying to engage: your employees! Over a year, employees retire, new hires come on board and preferences may shift. What worked last year may not be best for your demographics this year. It's time to understand what might have changed within your workforce, their communication preferences and the best-potential channels for reaching your employees.

What's more, your organization's benefits data can help uncover trends and opportunities to better engage employees (or targeted segments of your population) with benefits education and communications.

To help gauge your employee's preferences and measure trends, you can:

- ✓ **Review** your workforce demographics to see the latest shifts.
- ✓ **Create** opportunities for employees to provide feedback.
- ✓ **Conduct** a survey to get information straight from the source.
- ✓ **Dive into** your organization's benefits data.



### Best Practice:

Use various information sources to get well-rounded guidance on your communications plan.



**Pulse Surveys are quick**, focused ways to gain meaningful insight. Here are a few example questions:

- ✓ **Does our** HR/benefits team do a good job of communicating with employees?
- ✓ **Do you** think it's easy to take action on benefits communications?
- ✓ **Do you** think the current communication tools related to employee benefits are easy to use and understand?

### Learn more:

[How to Get to Know Your People Better Playbook](#)

[The Top 5 Ways to Get Employees Excited About Using Their Benefits](#)

[Seven Smart Ways to Harness the Power of Your Benefits Claims Data](#)



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## Piece Together a Calendar

**Now, you have a strategic vision** from your annual planning session plus knowledge from your information-gathering. You're ready to create a comprehensive communications plan for the year that specifies which communications are sent when, how and how often.

It can feel overwhelming, but you don't have to boil the ocean (we promise!). Here are some ideas for how to think about building your plan before anyone starts writing:

### Determine significant themes for quarterly focus.

Do you want to emphasize financial wellness in the year ahead? If so, make that into a quarterly campaign. Use other major themes (e.g., mental health, physical wellness) to create campaigns for your other quarters, with open enrollment taking one primary place.

### Consider targeted monthly educational campaigns.

Breaking topics down into bite-sized chunks can make it easier for employees to digest information. Popular themes that are relevant to many employees and can be connected to your employee benefits programs include heart health and preventive care. You can even segment your workforce by cohorts and deliver targeted messaging that speaks directly to them.

### Experiment with new channels or ways to tell your story.

Maybe from your information-gathering you heard that your benefits aren't resonating through your culture, or that employees aren't "seeing themselves" in your benefits programs. This may be the year to dive deeper into branding your benefits, using additional digital channels, and promoting benefits with the help of executive champions or employee testimonials.



**Getting your plan on paper** and into a calendar is one of the most challenging steps, but it is worth it. Once it's on the (metaphorical) page, you'll be ready to rock and roll!



### Best Practice:

It's all about the data, data, data! Look at what your employees tell you, what your analytics show and how your demographics shift. Plus, listen to your gut.

### Learn more:

[Creating a Benefits Communication Calendar for Year-Round Engagement](#)

[Your 12-Month Guide to Keeping Employee Benefits Front-and-Center](#)

[The Top 5 Ways to Engage Company Leaders in Employee Benefits Success](#)





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### Develop and Deliver Your Content

**Now, it's time to create and deliver your content.** Using your timeline, create your content, whether that's emails, text messages, flyers, etc. Be sure to connect with your benefits program vendors to see what resources they have available to lighten your load.

If you're fortunate to have an inside marketing and design team that can support your benefits communications, that's great! But if not, get access to a free online graphic design tool that makes it easy for the non-designer to create posters, videos, logos and more.

Either way, follow these employee communications guidelines:

- ✓ **Attract readers' attention** with a catchy subject line or headline – and keep their attention with readable, scannable copy.
- ✓ **Try to avoid jargon** so messaging is clear (and not confusing!).
- ✓ **Provide clear directions** so they know what to do next or where to go to learn more.
- ✓ **Make communications personal** by adding relevant details such as the employee's name, life stage and benefits products.
- ✓ **Add an element or two of fun**, such as a theme or catchy fonts or images.

**Next, it's a matter of following** your timeline and ensuring communications are delivered to the right employees at the right time.



#### Best Practice:

Landing the right content can be a lot of trial and error. You may find that something you thought would hit home falls flat. That's okay! Use your analytics (more on that next) to dig into what may be going on and keep plugging away.

#### Learn more:

[The Top 5 Ways to Make Your OE Communications More Clickable](#)

[Prioritizing Employee Communication to Help Boost Benefits Engagement](#)

[How to Boost Employees' Personal Health Literacy](#)



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## Analytics

**Arguably, one of the most important strategic steps** in your employee benefits communication approach is the last one — measuring your results. Don't let your hard work go to waste.

The truth is that program effectiveness can mean different things to different teams, so it's essential to establish what it means to you and your company. Here are some ways you can measure it for yourself:



### Set key performance indicators on your plan.

**Ask a question like:** Did our communications drive the intended business outcomes?



### Set a baseline through software tools.

**Ask a question like:** Did our communications reach our target audience?



### Measure the effectiveness through an employee survey.

**Ask a question like:** Were the communications we sent engaging and helpful to you?

**Ultimately, it boils down to the question:** What does **success** look like to you?



### Best Practice:

Measure analytics over time. For example, if you're interested in understanding how your communications are moving the needle on a particular benefit, then you'll need to measure the performance of multiple communications.

### Learn more:

[Assess for Success Employee Benefits Enrollment & Engagement Playbook](#)

[Your Mini Guide to Measuring Employee Engagement with Benefits Communication](#)

[10 Simple Ways to Improve Employee Communication about Benefits](#)





## SECTION 2:

# Top 5 “Musts” for Getting Your Communications Strategy Right

Here are **five tips** we suggest so your communications hit the right notes.

### 1 Must Have a Mobile App

As of June 2024, mobile phones account for **60 percent of all global web traffic**, and **97 percent of Americans** own a mobile device. These days, most of our lives can be managed on a mobile device, and employees expect benefits to be no different. Some might say a mobile app is more than a nice thing to have; it might be a necessity.

It’s not simply about being able to shop for benefits during your enrollment period. Like any other consumer experience today, employees want access whenever and wherever. They should be able to quickly view all active benefits, coverage details and ID cards. Likewise, if they’re at the pharmacy and want to check their HSA account balance, they should be able to do so.

Mobile apps can be another communication outlet for HR teams. With features like push notifications, reminders and embedded resources, HR teams can use mobile apps to drive awareness and action.





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## Must Embrace Storytelling

Remember story time at the library? In the same way we were captivated by stories in our youth, it's important to bring that to employee benefits experiences today. Storytelling connects. It has the power and potential to make the abstract real. An employee may not understand what taking advantage of a voluntary caregiving benefit means, but suppose a coworker shares a three-minute video explaining how that same benefit impacted their life, relieved stress for them and provided guidance and support throughout a time when they needed it. In that case, that story can make a real impact on both the employee and you as their employer.

Ultimately, employers that embrace personal and inspirational storytelling may find it easier to show workers how benefits help them nurture their total well-being. As a bonus, they might be more likely to feel seen and cared for by you – their employer.

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## Must Measure Results

You must track the success of communications and share the results. If you do all the work but don't take the step to understand how well employees engage with communications, then it will be all for nothing – or, at least you won't be able to make improvements that drive better outcomes. But what should you measure? And where do you even begin?

### Here are a few metrics to consider tracking:

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- ✓ **Open rate**  
Whether it's a text message, email or newsletter, open rates show the percentage of employees who open your internal communications.
  - ✓ **Click-through rates**  
This metric shows the percentage of individuals who click on a specific link within your communication. Their clicks represent interest in the content being shared.
  - ✓ **Page views**  
While click-through rates are an essential metric, you want to know that employees viewed the content you directed them to. Page views confirm that a person landed on the destination and fully loaded after clicking on your link.
  - ✓ **Read time**  
How long did someone stay on the page? This is what read-time answers.
  - ✓ **Video views**  
You may be directing someone to a video, so you'd want to know how many of the total population watched the video.
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## Must Be Multi-Channel

It may seem obvious, but relying on a single communication channel puts your message at risk of being unnoticed or even ignored. And in our digital age, there are many channels at your disposal:



### Digital:

Email, text messages, videos, internal communication channel postings (e.g., Slack, Microsoft Teams), mobile app pushes and more



### Analog:

Mailers, flyers, posters and other communication assets that employees can physically take to digest now or later



### Live and in-person:

Team meetings, manager check-ins, benefits fairs and lunch-and-learns (even if these occur online)

Communication plans should respect employees' preferences for channels and timing, with both "push" and "pull" options, from online portals and HR hubs to mobile apps. Push communications are like those mentioned above; they "push" the employee to act, visit your benefits portal, access your mobile app, etc. With pull communications, you're placing information within your benefits portal or mobile app for employees to access on-demand. The responsibility is on the employee to access and use the information.

New **research** shows a wide range of employee communication preferences. Overall, when looking at employees holistically, there are no dominant channels.



## Must NOT Be Overwhelming

Throwing everything but the kitchen sink regarding employee benefits communication can be tempting. You want employees to take advantage of everything, especially when you've worked hard to offer more comprehensive benefits. In fact, **83 percent** of HR managers have added new benefits in response to today's hiring market.

But the truth is that "more benefits" only adds to the complexity of benefits management. One-third (**31 percent**) of Americans admit the thought of annual enrollment makes them feel "overwhelmed" or "discouraged," with Gen Z (45 percent) and Millennials (36 percent) feeling the most overwhelmed and Gen X (31 percent) and Boomers (32 percent) feeling the most discouraged.

Ultimately, it's a balancing act to prioritize employee communication in a way that boosts engagement. You can still raise awareness and provide education, but the point is to tailor (and simplify) that communication to highlight what matters most to different cohorts of employees.



# 31%

of Americans admit the thought of annual enrollment makes them feel "overwhelmed" or "discouraged"





## SECTION 3:

# Considerations for Targeting Your Message

**If you want communications to stick**, getting comfortable with segmentation is imperative. Segmentation is the fancy term for tailoring content based on different segments of your workforce, and it has gotten a glam up.

Traditionally, HR teams have thought about it in terms of demographics, which is still a valuable way to consider employee communications. There are many different lenses to look at when segmenting your audience, making it easier to meet employees where they are, whether that's the life stage, career stage, or the time of the year.



## Generational Preferences to Meet Life Stage Wants and Needs

**Let's first look at the latest generational preferences.** While it can be a broad brush, it provides an excellent foundational starting point for understanding the differences within the cohorts and how that may play into your employee communications.

According to **MetLife**,



**Baby Boomers** prefer to learn about benefits through in-person conversations.



**Gen X** employees prefer online resources.



**Millennial** employees prefer video and podcast content.



**Gen Z** employees cite social media (i.e., short-form explanation) as their top communications source.

**Remember your subpopulations.** For example, according to **MetLife**, more than 40% of Gen Z Hispanic employees consume media in both Spanish and English. Therefore, if you have a large Hispanic population, you'll want to have employee communication options in both languages.

## Annual Enrollment Communications to Maximize Benefit Adoption

Communicating open enrollment can feel like a job unto itself. But it's also one of the most valuable times to bring employee benefits front and center, and it deserves dedicated messaging. So, here are some questions you can ask about how to make your communications more successful, along with resources to guide you:

### How can you work smarter (not harder) and more creatively to educate and communicate?



Find out in the [Warm Up for OE Employee Benefits Enrollment & Engagement Playbook](#).

### What are ten things you could do to make OE more successful?



Think about leaning on partner resources, being transparent with a call to action and making information digestible. [More here.](#)

### How can you bring your benefits-fair strategy to life with branding and communication?



Find out with this [Benefits Fair in a Box](#).



## Targeted Messages to Help Drive Outcomes

**Who says employee benefits communications can't be fun while making an impact?!** Think of these outcome-based messages as mini-campaigns, ones with a specific purpose. For example, every month offers new ways to connect employees with benefits. February is American Heart Month, which gives you the opportunity to encourage positive behaviors, educate employees and drive engagement with benefits. Not to mention, these mini campaigns that have a clear, connected theme can be an excellent way to get employees energized and help build workforce culture.

The same goes for a new benefit offering. Instead of waiting to announce it during your upcoming annual enrollment period, consider giving it a spotlight with targeted messages to a cohort of employees it would resonate with most.

Need help coming up with mini-campaign ideas? Use our **12-month guide** to keeping employee benefits front and center!


## Life Moments Education to Engage

Did you know **nearly 8 out of 10 employees (79 percent)** want benefits tailored to their life stages, positions and personal circumstances? That's valuable information and cause for minor celebration! Knowing your employees want the information tailored this way makes it that much easier to do so.

Consider an employee who has upcoming parental leave. It's a moment that's likely filled with many emotions and lots of questions. Not only do they need to understand your company's specific leave policy, but they may also need assistance once their child arrives, including pediatric care, mental health support, caregiving, life insurance policies and more.

Pinpointing the different life moments your workforce may be experiencing and then understanding the benefits that coincide with those can help you create communications that engage and empower employees. You'll meet them exactly where they are, and they'll feel all the more thankful for it.

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**79%**

want benefits tailored to their life stages, positions, and personal circumstances

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## New Hire Orientation to Boost Excitement

**New hire orientation** may be a place where it's tempting to be "generic" with your benefits presentation. Resist the urge to give the same spiel time after time, or worse, send employees a benefits packet they are expected to sift through and understand before making elections. Instead, let onboarding be capital F-U-N. Play off the fact that it's usually a time of excitement for those joining the company, and capitalize on the fact that it is a great place to include targeted benefits messaging.

For example, some companies onboard in groups. If that's the case for your company, this provides an opportunity to research. Find out who will be at the new hire orientation and their demographics. Then, tailor your presentation to showcase the benefits that may be the most applicable. Another option is to ask anonymously at the start of the new hire orientation for each person to submit the top benefit they would like to know more about. In addition to covering core benefits, you can highlight what the new hires want to know.

### Do you need help putting a benefits communication plan into action?

It's no secret that benefits administration can be challenging. And even when you're a Jedi master of benefits communication, sometimes you need to call for reinforcements. To bring everything in this playbook to life, you'd likely need at least one dedicated HR communications resource, if not an entire team of professionals.

Outsourcing employee communications to a trusted benefit administration partner as part of your broader end-to-end benefits engagement strategy may be worth exploring.

### Are any of these challenges true for your organization?



#### **Not getting the results you want.**

Simply put, your current employee benefits communication strategy is not working the way you want it to.



#### **Your benefits team is already at capacity.**

Your in-house team doesn't have time to create more benefits content, educate employees or answer more phone calls.



#### **Budget is a top concern.**

Rising health care costs and broader economic uncertainty have limited or removed the wiggle room in employee benefits budgets.



#### **Employees are confused or overwhelmed by benefit choices.**

Employees may have access to lots of benefit information but not the support and guidance they need to understand and navigate their options.

**We're here to help.** Benefitfocus offers a multi-channel employee communication service designed to build awareness and engage employees. With Benefitfocus taking on the tasks of employee communications, HR Teams can redirect focus to being more strategic, maximizing the impact of their benefit program on their business.



Learn more about our **Employee Benefits Communication Services!**

