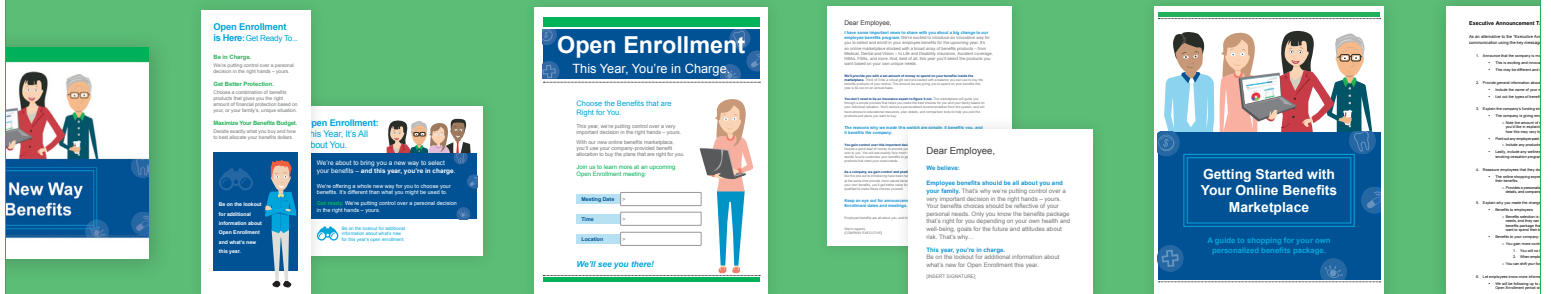


Preparing for Open Enrollment: Employee Communication Campaign

Employer Guide



What's Inside

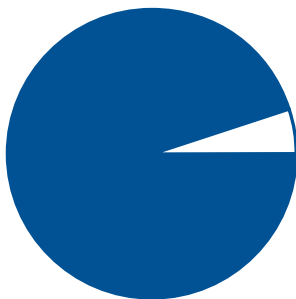
Your Guide to Open Enrollment Success	3
Best Practices.....	4
How to Use this Campaign	5
Campaign Components	6
Communication Timeline.....	9
Automatic System Communication.....	10

Your Guide to Open Enrollment Success

Congratulations! You've made a great decision by moving to an online benefits marketplace. As with any corporate-level change, good communication is essential to ensuring a successful outcome. That's why we've created this guide to help you effectively communicate this new system of benefits to your employees.

Equally as important as preparing your employees for what to expect is relaying why the company made the change and how your employees will reap the benefits. Communicating these points will help ensure they feel valued by your company and also better understand their benefits. And through thousands of successful Open Enrollment periods, we've seen just that.

Based on a survey of employees who have used Liazon's Exchange:



95% reported they preferred choosing their own benefits over having their employers select for them.



87% were satisfied with the number of choices available in their marketplace, or wanted even more.



85% of employees reported they are actually more engaged in their health care decisions by their second year using an exchange.

One of the most important things you can do to help prepare your employees is hold an Open Enrollment meeting. But you also need to stress the importance of this year's meeting because things are different – and better for them. We'll help you communicate these points in advance of the meeting through your "Employee Communication Campaign" – a range of easily digestible materials distributed via multiple touchpoints. Together, we'll help get them ready for, and excited about, this new way of buying benefits.

Best Practices for Your Employee Communication Campaign:

We've helped more than 1,000 companies make the switch to an online benefits marketplace. Here are some things that we've learned work best for both you and your employees:



Map out a calendar of communications and events leading up to your Open Enrollment period (see our suggested timeline on page 9 of this guide).



Hold in-person Open Enrollment meetings (try to give a few dates as options to ensure maximum attendance).



If you have a workforce located in many different areas, in-person meetings may also be supplemented by a webinar (we've included a PowerPoint presentation with this guide that can serve either purpose).



Use a combination of printed materials as well as electronic communications to make sure you reach all employees in the ways they prefer.

As employees enroll through the marketplace, they'll be provided with all the information and resources they need to make smart decisions. No more hassle distributing individual plan documents – it's all right there in the portal for them to access with decision support guiding them every step of the way.

A Turnkey Campaign at Your Fingertips

We've created an Employee Campaign for you that contains all the materials you'll need as well as suggestions for how to roll them out. By following this guide, you'll be able to frame expectations, address change anxiety, and have a more engaging and successful Open Enrollment experience.

Focusing on **three key messages** in your Employee Campaign will allow you to easily convey the most important aspects of your new, innovative approach to benefits:

- 1** Employees are in charge...and they should be.
- 2** Employees can choose more benefits products for better protection.
- 3** By choosing only the plans they want, employees get more bang for their "benefits buck".

We've taken the guesswork out of conveying these messages and prepared everything for you to make this campaign as seamless as possible for your team. These Employee Campaign materials are designed to be easily shared both electronically via email communications, as well as printed from your office printer.

How to Use this Campaign

Following a demonstrated formula for success, your Employee Campaign is designed to be rolled out as a complete package in a recommended order, as detailed in the proposed timeline on page 9. Each piece supports the next in forming a cohesive message that keeps your employees informed, empowered, and energized throughout the process. Of course, you know your company best and may have your own practices for information sharing. So feel free to adapt these materials as needed.

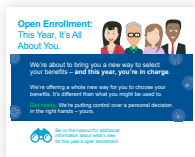


Campaign Components

Your Employee Campaign consists of different types of communications outlining the key messages on the previous page to help reach your employees repeatedly and through multiple touchpoints. Below, you'll find a list of each component with instructions for how to customize them for your company.

Introductory communication

Get employees intrigued and excited about the change to come!



7"x5"

Postcard

File name

1. Employee Postcard

Recommended use

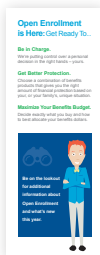
This first communication can be left on office chairs or in company mailboxes, or can also be mailed to employees' homes.

How to customize

- We've left space in the bottom right-hand corner for you to add your company logo using PDF editing software such as Adobe® Acrobat.
- The postcard front contains editable text fields where you can enter your company and employee mailing addresses if you opt to mail the postcard.

How to Print

- Print in office or supply completed PDF to printing shop. Finished size is 7"x5".
- Print only the postcard back if you opt to distribute in your office.



3"x8.5"

Statement stuffer

File name

- 1a. Employee Statement Stuffer

Recommended use

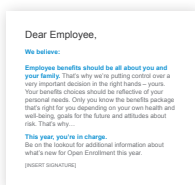
As an alternative to the postcard and/or emails (listed below), this piece includes all three key messages in one place, and can be included in an envelope with a paycheck or other company correspondence. This piece could serve those employers who don't regularly communicate with their employees via email or who have employees distributed across many geographic areas.

How to customize

- We've left space in the bottom left-hand corner to add your company logo using PDF editing software such as Adobe® Acrobat.

How to Print

- Print in office or supply completed PDF to printing shop. Finished size is 3"x8.5".
- Note: 3 statement stuffers can be printed on one 8.5"x11" page using PDF editing software such as Adobe® Acrobat.



3 introductory employee emails

File names

2. Employee Intro Email 1
3. Employee Intro Email 2
4. Employee Intro Email 3

Recommended use

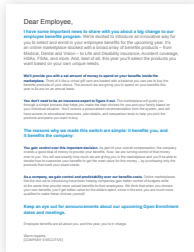
This series of emails to employees explains the advantages of the new benefits marketplace. These are designed to be emailed in the order indicated in the timeline on page 9.

How to customize

- Suggested email subject lines can be found in the Word document headers.
- The body of each email can be cut and pasted into your company's own email template or formatting, and edited as desired to fit your needs.

Executive communication

Explain the change that's coming and why it was made.



Executive email

File name

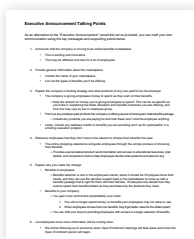
5. Executive Kickoff Email

Recommended use

Email to employees from an executive (e.g., CEO, head of HR, etc.) to formally introduce the new marketplace. For companies that don't communicate to employees by email, you can drop the same text into a letterhead and send printed copies to your employees.

How to customize

- The suggested email subject line can be found in the Word document header.
- The body of the email can be cut and pasted into your company's own email template or formatting, and edited as desired to fit your needs.



Alternative: Executive email talking points

File name

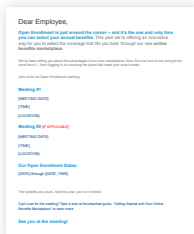
5alt. Executive Kickoff Email Talking Points

Recommended use

Use as an outline for an executive email if you prefer to write your own kickoff email, or for an in-person speech from the executive at a meeting, such as a Town Hall.

Open Enrollment Meeting logistics communication

Encourage employee attendance at your Open Enrollment meeting.



Meeting announcement email

File name

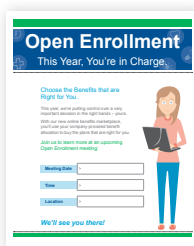
6. OE Meeting Announcement Email

Recommended use

Email to employees from your company's representative leading Open Enrollment and benefits activities. We also recommend attaching the "Employee Guide" (described on the next page) to provide more details to employees who may want more information before the meeting.

How to customize

- The email subject line can be found in the Word document header.
- The body of the email can be cut and pasted into your company's own email template or formatting.
- There are spaces to enter your Open Enrollment Meeting date(s), time(s), and location(s). We also encourage you to include your Open Enrollment period start and end dates so employees have as much notice as possible.



8.5"x11" or
11"x17"

3 in-office posters

File names

7. OE Meeting Announcement Poster 1
8. OE Meeting Announcement Poster 2
9. OE Meeting Announcement Poster 3

Recommended use

Hang around the office to announce the Open Enrollment Meeting date(s), time(s), and location(s).

How to customize

- Each poster has editable text fields so you can enter your meeting date(s), time(s), and location(s).
- We've left space in the bottom left-hand corner to add your company logo using PDF editing software such as Adobe® Acrobat.

How to Print

- Print in office or supply completed PDF to printing shop. Finished size is 8.5"x11" or can be enlarged to 11"x17".

Open Enrollment Meeting material

Hold a successful Open Enrollment meeting.



PowerPoint Presentation

File name

10. OE Meeting Presentation

Recommended use

Present during your Open Enrollment Meeting. This presentation includes slide notes within the file that will give you the corresponding voiceover to each slide. The presentation is designed to be delivered by a representative from your company or by your broker.

How to customize

- Each slide has a space in the bottom right-hand corner for you to add your company logo.
- On Slides 5-8, you'll find a variety of product categories and types. Remove any icons and corresponding text in the notes for any products you're not offering. If you're not offering any products in a category, you should remove that slide from the presentation.
- On Slide 9, you'll find a table for you to enter key details about each of the medical plans you're offering. You can duplicate this slide if you need more room or delete any parts of the table you don't use. You can also print and distribute this completed slide(s) with the Employee Guide at your Open Enrollment Meeting, so employees can easily see the differences in the plan options. Alternatively, you can email a copy of this slide to your employees.
- On Slide 14, there is an area for you to enter your Open Enrollment dates as well as the contact details for someone at your company who can address any questions your employees may have.



8.5"x11"

Employee Guide

File name

11. Employee Guide

Recommended use

Distribute to employees before the Open Enrollment period begins. We recommend including this document in the email announcing the Open Enrollment Meeting as indicated above, but this can also be printed and handed out during the actual meeting.

How to customize

- You can add your company logo to the cover page by editing the footer section and pasting your logo there.
- Beginning on page 6, review the "Products in Your Marketplace" section and remove any products you don't offer in your marketplace. You can also edit the individual product sections' text by adding specific details about the plans you're offering in your marketplace.
- Once you've made the necessary edits, save the Word Document as a PDF before sharing with your employees.

How to Print

- Print in office or supply completed PDF to printing shop. Finished size is 8.5"x11".

Communication Timeline

Below, you'll find two timeline options for implementing your Employee Campaign. The first is our recommended timeline which spaces out the communications across several weeks. However, we understand some companies may not be able to use this timeline due to time constraints, so we've included a condensed version as an alternative.

Recommended Timeline					
Week	Monday	Tuesday	Wednesday	Thursday	Friday
1	Postcard OR Statement Stuffer mailing (or distribution)				
2	Employee introductory email 1		Employee introductory email 2		Employee introductory email 3
3	Executive email		Open Enrollment meeting email & in-office posters		
4			Open Enrollment meeting		
5	Open Enrollment begins				

Abbreviated Timeline					
Week	Monday	Tuesday	Wednesday	Thursday	Friday
1	Postcard OR Statement Stuffer mailing (or distribution)		Employee introductory email 1		Employee introductory email 2
2	Employee introductory email 3		Executive email Open Enrollment meeting email & in-office posters		Open Enrollment meeting
3	Open Enrollment begins				

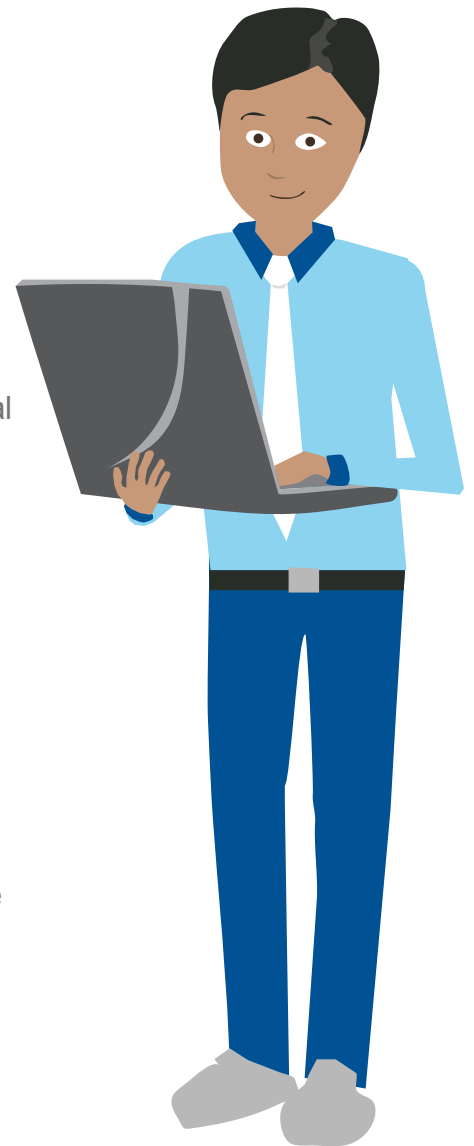
Automatic System Emails (Optional)

You're now well on your way to preparing your employees for a successful Open Enrollment. But the communication doesn't stop there. Your online benefits marketplace is designed to continue the conversation you've started.

The system-generated emails listed below will help to make sure your employees get the most out of their marketplace experience and are kept informed of important dates and milestones, both during Open Enrollment and throughout the year. Note that these emails are optional by employer.

Automated emails include:

- **Welcome email for employees**
Sent prior to Open Enrollment and includes marketplace URL and login credentials
- **Open Enrollment close reminder**
Sent two days before the close of Open Enrollment
- **Confirmation of enrollment**
Sent after the employee purchases benefits in the portal
- **Life event reviewed**
Sent when an administrator reviews a life event
- **Confirmation of your approval or denial of any life event submissions**
Alerts employees when a life event request is approved or denied by your company's administrator
- **Pending life insurance updates**
Alerts employees of an update in their pending coverage
- **Password reset**
Sent when an employee clicks "Forgot your password?" on the homepage and includes a link to reset his or her password



You're Ready to Enroll!

**Good luck! And remember,
you're never in this alone. You
can always reach out to your
Liazon teammate or broker for
any questions you may have –
we're here for you!**

