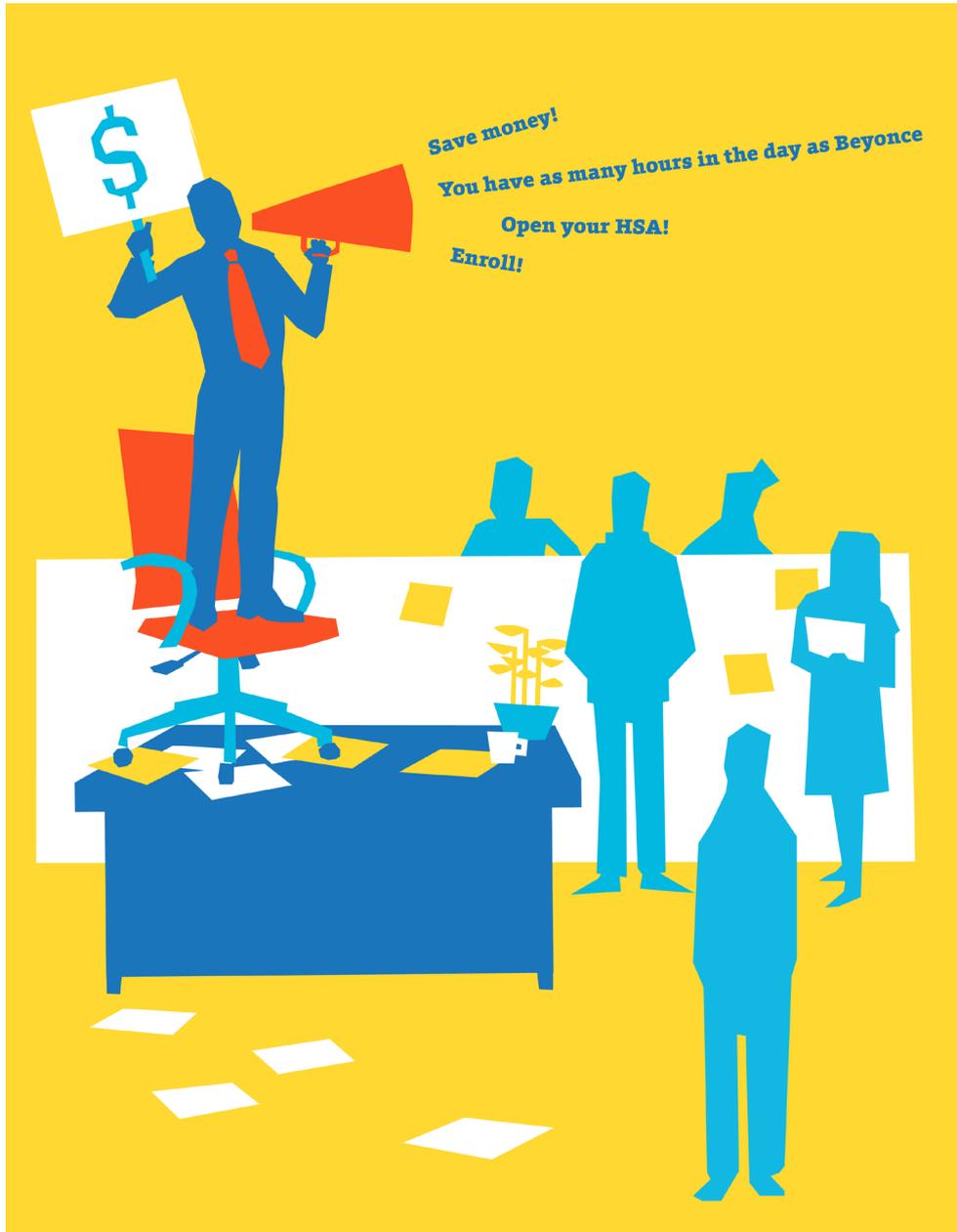


The alex® Guide to  
**Epic HDHP & HSA  
Communications**



**HELPING YOUR EMPLOYEES MASTER THEIR PLANS**



# It's the year 2019.

Your employees are overpaying for meds. They're going to the ER for the sniffles. Meanwhile, their HSAs are empty, lost to the sands of time.

It'll take an HR hero to save these HDHP users some money. An HR hero like you. Your weapons? Good communication. A steely gaze. And a calendar.

# Plan Your Attack

Two weeks before the plan year begins



No foe was  
ever vanquished  
without a solid  
**to-do list.** So before  
the insanity of the  
plan year descends:

**Create two email lists: one for *all* employees with HDHPs and another for *new* HDHP users**

(Sure, it's easier to just use one. But the more targeted your message, the better.)

### **Post an FAQ page on your intranet**

Keep it under ten questions, or you'll find people overwhelmed by the FAQ *and* by their health plans. Use real, human words: your real humans will thank you. And make sure your questions reflect the concerns of different employee types: Millennials just off their parents' plan, older employees behind on retirement, people who stink at math. And so on.

### **Try these on for size:**

- Is an HSA different from an FSA?
- Do I *have* to open an HSA?
- How much money should I put in my HSA?
- This plan looks way more expensive than my PPO. What gives?

Not to brag, but we know of a tool that helps employees understand their benefits way better than a FAQ page.

**Visit [jellyvision.com](https://jellyvision.com) to learn more.**

# Fight Forgetfulness

The first week of the new plan year



## CHECK THIS OUT:

**40%** of HSA-eligible HDHP users never even open an HSA\*. That's almost most of them!

Some forget, some avoid it, some don't know where to begin. And when your employees miss out on tax savings, not only is that bad for them, your company misses out on payroll tax savings, too.

Remember those two email lists from last month? That's right, it's mass email time.

To make life extra-easy, we wrote two "new plan year" emails for you. [One for newbies](#), [one for experienced HDHPers](#). Cut 'em, paste 'em, rewrite 'em. You won't hurt our feelings.

### File Under "Yikes"

- 66% of employees don't know how an HSA works.\*\*
- 70% of HSA participants can't pass a basic HSA proficiency test.†
- Only 16% of employees claim to be "very knowledgeable" about HDHPs.‡

\* 2014 Employee Benefits Research Institute study

\*\* 2013 Fidelity survey

† 2014 Alegeus study

‡ 2017 ALEX Benefits Communication Survey

# Prevent Sticker Shock

The week insurance cards are mailed out



When HDHP  
newbies get their  
**first medical bill**  
...well, some  
regrettable words  
may be uttered.

**Set expectations ahead of time to avoid  
getting an earful**

[Share these two editable info sheets](#) to help HDHP newbies navigate their first visit to a doctor's office and pharmacy. Then share some money-saving tips to help soften the blow of their first bill.

**Try these on for size:**

1. Check prescription prices on a site like [Goodrx.com](#) before you buy your meds. Prices at different pharmacies vary way more than you might expect.
2. If you're sick or hurt but it's not life-threatening, try an urgent care center. You'll likely get quicker and cheaper care than at the ER.
3. Get free online medical advice from a real doctor, without leaving your Kleenex-riddled bed. Download the software for our free telemedicine tool now.

Hey, just wanted to "not brag" again about another one of our tools—[ALEX on Making the Most of Your Plan](#). It gives great consumer advice, answers FAQs, and links to your company's resources.

# Stay the Course

The months before OE planning starts up again



## CONGRATS:

You've crushed the beginning of the plan year, the wildest of HDHP foes! But don't get too comfortable.

**Your employees need your help all year long.**

Time to brandish your trusty calendar.

### April 2

Take advantage of the 100% real holiday, "[Employee Benefits Day](#)", to promote the benefits and perks of your choosing.

### April 15

Remind HDHPers to boost HSA contributions now for a bigger tax break next year. And since many people make last-minute 401(k) contributions around Tax Day, it's worth reminding employees that their HSA can be also used as a retirement account—one where withdrawals are tax-free.

### May

An effective way to boost HSA usage is to get your employees to talk about how great those HSAs are. Ask for volunteers to give you juicy quotes. Offer incentives if you need to. Then share their blurbs all over the joint, and watch as HSA sign-ups multiply.

For more detailed advice, [download our eBook, 9 Free Tips for Using Employee Testimonials in Your Benefits Communication.](#)

## June

Not only is June the beginning of summer, it's also halfway through the year. Your employees might appreciate reminders about resources on quitting smoking, losing weight, eating better, and mental health.

It's also a good time to encourage them to go in for the annual check-up that comes free with their HDHP, if they haven't already.

## July – August

No one likes to think about how much they're actually spending on health care. But if you encourage your employees to compare actual expenses to their HSA contributions, they can decide if more contributions are necessary and possibly get more tax benefits as a result. If their expenses go down, no problem: they can hold onto the extra money until they need it.

You know, we just thought of something. Our tool, [ALEX](#), is great at showing just how much money employees can save using an HSA.

Learn more communication tips by [contacting us directly](#), [reviewing our blog](#), or downloading one of the helpful eBooks below:



[The Ultimate Open Enrollment Communication Playbook](#)



[6 Tips for Communicating Benefits to Millennials](#)



[9 Tips for an Engaging, Readable, Not-Boring Benefits Guide](#)



[Curing Benefits Bewilderment](#)

## About ALEX

ALEX saves HR leaders time and money by guiding employees through difficult health insurance, retirement savings, leave of absence, and wellness decisions. More than 1,500 companies, including 114 of the Fortune 500, with more than 18 million employees in total, trust ALEX to transform confusing jargon, legalese, and gobbledegook into useful information and helpful advice. To learn more, please visit [jellyvision.com](http://jellyvision.com).

## Follow us on social media!



NEW FOR  
2018-  
2019

THE ULTIMATE  
OPEN ENROLLMENT  
COMMUNICATION  
PLAYBOOK



FEATURES REAL HR SUCCESS STORIES!

AN EBOOK FROM alex®



<b>INTRODUCTION</b>	3
<b>THE SCHEDULE</b>	
Planning and Strategy	5
To Do: 8–12 Weeks Before Open Enrollment	7
To Do: 4 Weeks Before Open Enrollment	9
To Do: 1–2 Weeks Before Open Enrollment	11
To Do: During Open Enrollment	14

## **TOOLS & INSIGHTS**

ALEX® Open Enrollment Communication Checklist	17
5 Tips for Creating More Engaging Open Enrollment Messaging	18
9 Outside-the-Box Open Enrollment Communication Ideas	21

## **OPEN ENROLLMENT COMMUNICATION SUCCESS STORIES**

## **LINKS TO MORE RESOURCES**

## **SAMPLE OPEN ENROLLMENT CONTENT**

Sample Email	32
Sample Postcard	34
Sample Poster	36
Sample Intranet Banners	37

## **BENEFITS-IAL BODY SCRUB**

## **ALEX SOLVES PROBLEMS**

## **ABOUT ALEX & JELLYVISION**

# Introduction

In this fourth edition of the Ultimate Open Enrollment Communication Playbook, we've got a new and improved treasure trove of communication resources to share.

Inside you'll find:

- A three-month open enrollment communication schedule
- Checklists and sample communication templates
- Tips on engaging your most elusive, unenthusiastic employees
- 3 all-new OE communication success stories
- Links to new ALEX blog posts, eBooks —and more!

For more info about ALEX (our platform of employee engagement software) OR to suggest things to include in next year's edition, visit [jellyvision.com/contact](https://jellyvision.com/contact)...we'll get right back to you. Happy open enrollment!



# THE SCHEDULE

# Planning and Strategy



## *Review last year's communication plan with your team*

Look over last year's employee communications (PowerPoint presentations, emails, mailers, etc.) and answer these questions:

- What parts might have been unclear or raised more questions than they answered?
- What parts did a better-than-average job of grabbing employees' attention?
- How eye-catching and memorable are the images included in your content?



*Ask your company's communication specialists (writers, artists, and/or marketers) for feedback, too. They deal with words and images all day long, so they can definitely help with yours.*



## *Set clear goals and choose a marketing theme*

Work with your team to figure out your top three goals for open enrollment. Maybe you want to migrate more employees to a new plan. Or boost Health Savings Account (HSA) or 401(k) contributions. Or cut down on the time your team spends answering questions. Once those are nailed down, think about what kinds of communications would most effectively motivate your employees to take the actions needed to achieve those goals.

Specifically, identify what they have to gain if they take those actions and what they might lose if they don't. Then highlight those potential benefits (and losses) in your messaging. ("Spending 10 minutes with our new benefits decision support tool could help you save hundreds of dollars on health care this year.")

**For more specific advice on using marketing tactics to engage your workforce, download our eBook, [3 Secrets to Creating the Most Engaging Open Enrollment Ever.](#)**

### **3** *Get feedback about last year and your ideas for the future*

Sign up for an account with an online survey provider like **SurveyMonkey** if you don't already have one. Then build a brief, anonymous survey so your employees can tell you how they feel about their benefits. Ask them about their communication preferences, too.

### Here are two examples for reference:

1. How satisfied are you with the following benefits?

	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
Medical insurance					
Health savings plan					
401(k)					
Financial wellness program					

Additional comments:

2. Evaluate the following statements about our benefits communications:

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
Our benefits guide helps me figure out which health plans are the best fit/most affordable					
The emails HR sends about enrollment make it clear what I need to do to successfully enroll					
Texting me updates about open enrollment is a good way to get my attention					
I would like it if HR sent out monthly tips for using my benefits next year					

Additional comments:



# To Do: 8–12 Weeks Before Open Enrollment

Your open enrollment plans might be murky this far out, but there are a few things you can do now to make things easier down the road.



## Get a head start on making a better benefits guide

Make sure your benefits guide minimizes confusion and gives easy access to essential information.

Put yourself in a new employee's shoes: what might their top three questions be? How quickly will they get their answers using your current guide? How might they get those answers faster?

- Put the most important information first on every page.
- Put calls-to-action in a box or sidebar section to highlight their importance.

- Make sure the section titles in your table of contents match the titles on the actual pages exactly. ([This ALEX video](#) gives more tips on effective tables of contents.)
- Consider color-coding the main sections of the guide to visually distinguish them from each other.

For more info on creating a better benefits guide, download [9 Tips for an Engaging, Readable, Not-Boring Benefits Guide](#)



## ***Gather employee testimonials (and real pictures of your employees) for your OE messaging***

Honest, first-person accounts of using a product or service are a powerful marketing tool that not enough HR departments are using. Put out a call for employees who've had a good experience with whatever you're trying to promote, interview them for 10 minutes (on camera, over the phone, or via email), and use their feedback in this year's messaging.

Along with the testimonials, hire a photographer to take pictures of your employees at work, and use those pictures instead of stock images. Make a point of getting pictures of employees who represent both the range of jobs and the diversity of your workforce.



## ***Identify your needs for new and/or revised content***

Figure out which print and digital content you'll need to tweak or create from scratch, and base those changes on the OE goals you set with your team.

Make sure that the artists, writers, UX designers, and other people who will need to update or create this content are also aware of your goals.

If you need to hire outside talent but aren't sure where to look, some national freelance talent agencies include **Aquent**, **Creative Circle**, **The Boss Group**, and **Artisan**.



# To Do: 4 Weeks Before Open Enrollment

Now's the time to start reminding your employees that open enrollment is on the horizon.



## *Publish intranet banner ads*

If you used intranet banners last year, be sure to update them so they look and sound new. Consider adding a variety of banner ads that appeal emotionally to various segments of your population.

### **ALEX Customers**

Don't forget that we have ALEX-related intranet banners available for download at ALEX Central. See some examples on page 37.



## *Make a Manager's Toolkit*

Your employees' bosses are one of the most effective communication channels you have at your disposal. Make them a toolkit that includes basic talking points and FAQs they can use to help get your OE message across to employees.

But! Don't just drop this on your managers with nothing more than a high-five. Provide some ideas of when and how to share the information...the easier you make it for them, the more likely they'll be to actually do it.



### ***Add a note about open enrollment to your email signature***

Ask everyone in your HR department to add a line like “Don’t forget: open enrollment starts [Month], [Day]!” to their email signatures.

Also, strongly suggest that the managers in your company do the same, so employees will see the message repeatedly from the people they interact with every day.

Here are two ways you might approach this:

**Benjamin Fitzmanager**

312.555.1212

Shift Supervisor

Placeholder Industries

**Need help picking your benefits this year?**

[Talk to ALEX!](#)

**H.R. Pueffenschtube**

312.555.2323

Vice President of Global Benefits

Placeholder Industries

**Don’t forget: open enrollment starts**

**November 16!**



# To Do: 1–2 Weeks Before Open Enrollment

Remind your employees that open enrollment is right around the corner, and give them the information they'll need to make the best possible choices.



## *Hold benefits meetings and webinar events*

The sweet spot for a live employee benefits meeting falls at about one week before the first day of OE. Run it too early: folks will forget everything once they have to make their choices. Run it too late: they'll feel pressured and rushed.

*If your company has multiple locations around the country:* make sure every HR representative on the ground is using the same PowerPoint and talking points.

*If you do have meetings at multiple locations:* consider having the most knowledgeable members of your HR team call in so they're available to answer questions live.

*Within the first few days of OE:* Run at least two live webinars. Record the webinars and post links to the recordings throughout OE for anyone who can't make it.

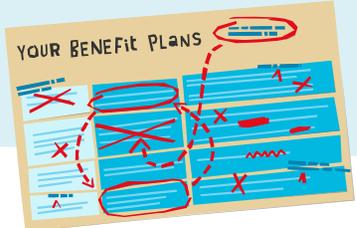
*If your company has employees working around the clock:* schedule your webinars at different times of the day to increase the likelihood of attendance.

### **ALEX Customers**

Check out our handy How to Lead an ALEX® Demo and ALEX PowerPoint Overview guides on ALEX Central.

## 2 Put up on-site posters, flyers, and table tents

Post assets in high-traffic areas—break rooms, cafeterias, parking structures—to grab employees' attention in a cost-effective way.



**So There's Been a Change of Plans...**

Every year, we make slight changes to our employee benefit plans that can affect your paycheck (through your premium contributions) and your pocketbook (through your deductibles, copays, and prescriptions).

To make sure your favorite plans still make sense for you and your family, please visit ALEX®, which has been updated with our new plan information, and fortified with new boredom-busting vitamins and minerals.

See if your favorite benefit plans still fit at [sampleURL.com](http://sampleURL.com)



Talk to ALEX on Whatever You Like



## 3 Schedule first postcard if you're doing a postcard campaign

If you're planning on sending postcards to people's homes reminding them to enroll, schedule one to arrive a few days after open enrollment has begun. If you send the postcard too early, people might want to take immediate action and not be able to.



**Picking Your Benefits Will Be a Snap**



### ALEX Customers

Don't forget to download an ALEX poster or postcard on ALEX Central.

## 4 **Create and share answers to this year's likeliest FAQs**

Compile a list of what you anticipate this year's FAQs to be, and answer them as clearly and succinctly as possible. A good goal when writing your FAQs is to make it feel like you're actually talking to the employee, so try and keep your answers simple, clear, and jargon-free. Then, put them on your intranet and/or email them to your workforce as a PDF.

Some common FAQs include:

- *What happens if I don't sign up for anything during open enrollment?*
- *Can somebody help me pick the right benefits?*
- *What if I make a mistake? Will I be able to fix it after open enrollment closes?*
- *Why am I being prompted to provide a Social Security number for my dependents?*
- *What's the difference between our FSA and HSA?*
- *Can I change my 401(k) and HSA contribution rate after open enrollment is over?*





# To Do: During Open Enrollment

Now's the time to gently and tactfully pester your employees about enrolling by the deadline—and give them the resources they need to do so.



**Send out at least three company-wide emails**

**Email #1** — Announcement Email (First Day of OE)  
*(Go to page 32 in this handbook to see an example)*

**Email #2** — First Reminder Email (Halfway through OE)

**Email #3** — Second Reminder Email (The day before OE ends)



Make sure to indicate the negative consequences of not enrolling in time, especially in the final two emails.



**Schedule a reminder postcard a few days before the end of OE**

If you're doing a postcard get-the-word-out campaign, send a second postcard that arrives 3-5 business days before the end of your open enrollment. Make it clear time is running out to enroll in order to create a sense of urgency.

## ALEX Customers

Remember to use the ALEX postcard templates on ALEX Central.

**3** *Remind managers to talk with their teams*

Now's the time for your managers to use the toolkit you sent them to explain the biggest changes to your offerings with their teams—and remind them to enroll.



# TOOLS & INSIGHTS

# ALEX Open Enrollment Communication Checklist

What To Do:	Action Item	Date Due	Date Completed
<b>Planning &amp; Strategy</b>	Review last year's communication plan		
	Set goals and pick a theme		
	Get feedback about last year and your ideas for the future		
<b>8-12 Weeks</b>	Start making benefits guide		
	Gather employee testimonials		
	Identify your needs for new/revised content		
<b>4 Weeks</b>	Publish internet banner ads		
	Make Manager's Toolkit		
	Add note about open enrollment to your email signature		
<b>1-2 Weeks</b>	Hold benefits meetings and webinar events		
	Put up posters, flyers, and table tents		
	Schedule first postcard		
	Create and share FAQs		
<b>During OE</b>	Send out company-wide emails		
	Schedule reminder postcard		
	Remind managers to talk with their teams		

# 5 Tips for Creating More Engaging Open Enrollment Messaging



As you're considering how to get your employees to take the action you'd like—be it using ALEX, going to your benefits fair, or joining the company wellness program—**think like a marketer.**

You can do that by putting yourself in the shoes of the people on the receiving end of your communications. Once you know their concerns, worries, and motivations, you can address them in a more engaging, helpful way.

**1**

***Answer the question "What's in it for me?"***

Don't just tell your employees what they should be doing. Tell them why it matters to them. In as few words as possible. Will using ALEX spare employees the regret they might feel if they missed out on potential savings? Will it give them peace of mind? Will it be the best benefits-related seven minutes of their life?

**2**

***Don't be shy about talking dollars and cents***

Employees are definitely thinking about the bottom line, so use that to your advantage. Instead of leading with a generic "Let ALEX help you choose your benefits" message, consider something more pointed like: "Is last year's plan really the best bang for your buck? Double check with ALEX."

**Here's a formula for an effective, money-based call-to-action:**

**Step 1:** Get the premium cost for your most expensive plan.

**Step 2:** Subtract the premium cost for your least expensive plan.

**Step 3:** Use the difference in a snappy message like this:

Want to know how you can save as much as [*difference amount here*] per month in insurance premiums this year? Talk to ALEX!



**Consider appealing to specific sub-groups of employees**

Along with your one-size-fits-all messages, consider messaging that appeals directly to certain audiences who might be more benefits-focused this year. For example, some of your posters or banner ads might ask:

- Are you a little behind on saving for retirement?
- Did anyone in your family start taking any new medications last year?
- Did you recently have your first child?

The message would conclude: If so, make sure to take a few minutes to talk with ALEX.

## **4** *Tailor your awareness campaign to your workforce*

This is sort of a no-brainer, but it's worth mentioning anyway.

For example, if a big percentage of your employees work in the field, away from the internet...an email-heavy campaign probably isn't the best plan. Instead, you could:

- Distribute break room posters and flyers
- Send postcards to the home
- Ask on-site managers to call a meeting

## **5** *Sprinkle in some humor, when appropriate*

We're big believers that a little benefits humor can go a long way towards getting your employees to perk up and listen to what you have to say.

For specific advice on adding a little levity to your benefits communications, download our eBook, [\*Your Employees Are Going to Laugh at You: Five Thoughts on Using Humor in Benefits Communication\*](#)

# 9 Outside-the-Box Open Enrollment Communication Ideas



A surprising message can catch people off-guard in a delightful way. And even more importantly, surprising messages are more memorable.

Here are nine outside-the-box ideas to consider:

## 1 *Don't be afraid to offer incentives*

Want to encourage folks to use your new open enrollment benefits decision support tool, or watch your how-to webinar? Consider socking away some money from your budget for prizes. Here are a few ideas related to ALEX:

- Use ALEX, and you'll be entered into a raffle to get \$1,000 added to your HSA fund. (Five such prizes will be offered.)
- Use ALEX, and be entered into a raffle to receive two extra PTO days. Or: everybody who uses ALEX gets an extra PTO day!
- Use ALEX, and be entered into a raffle to have your entire yearly deductible costs covered by the company.

## 2 *Hire a vendor to text employees on their smartphones*

If you have a list of your employees' cell phone numbers, you can provide that information to a third-party vendor (**Trumpia**, **MailUP**, **Mozeo** and **Twilio** are but a few) and have them text important messages (written by you) with links, whenever you want. If emails and signs around the office don't seem to get through, this might help.

## 3 *Introduce a last-second reminder screen saver message*

Ask your IT team if there's a way to apply a screen saver message to all the computer monitors in your office. Choose one particular day to have the new screensaver appear for everyone.

## 4 *Go big with eye-catching visuals at your benefits fair*

Get more eyeballs on your most important messages by creating a standee and making it a focal point in the room, or playing video content on a loop on a computer monitor. Or if you're really ambitious, dress up in eye-catching costumes. Our ALEX customers have dressed up like the cartoon characters in the ALEX conversation and **some of our Benefits Superheroes**...the sky's the limit.



**5** *Ask company leaders to send emails or voice mails on your department's behalf*

Are you introducing a new initiative or plan and want your workforce to really pay attention? Consider asking your CEO or another person of influence to send an email or an automated voice mail to employees directly, encouraging them to do just that.

**6** *Host fun lunchtime ALEX-focused activities during open enrollment*

To create some positive buzz around ALEX, consider hosting some fun onsite lunchtime activities with an ALEX theme.

One of our customers hid ALEX magnets around the office and entered anyone who found one in a raffle for a prize. Other splashy ideas you might consider: a friendly game of bean bag toss, except with ALEX stress balls instead of bean bags, or serving up some of our **benefits-themed mocktails** in your break room.

**7** *Remind employees to forward OE emails to their partner or spouse*

Consider including a call-out in the emails you send to your workforce that says something like this: (Psst! Does someone else call the health care shots at your house? If so, forward this email to them!)

**8** *Make use of internal communication platforms*

Does your company use messaging or collaboration software like Skype, Slack, or Chatter?

If so, make the most of these channels to promote ALEX and your benefits messages. Create an Open Enrollment Slack channel, post reminder messages on Chatter, and/or add a fun open-enrollment-themed message under your Skype handle.



## ***Make a simple “how-to” video to demonstrate complicated tasks***

Do your employees get tripped up when logging into a particular website or accomplishing some online benefits-related task?

Consider making a quick tutorial-style video that shows someone from your team successfully doing that tricky thing step-by-step. (Or hire an outside vendor to help you.)

Interested in trying this out? Here are a few software options you might consider to help you record on-screen activity:

### **For PCs and Macs**

**Camtasia** (paid software), **Jing** (free software)

### **For PCs only**

**CamStudio** (free software)

### **For Macs only**

QuickTime (which should already be installed on your Mac), **Soundflower**

(To find out how to sync these up, [watch this brief tutorial.](#))

# OPEN ENROLLMENT COMMUNICATION SUCCESS STORIES



# Allianz

## INDUSTRY:

Insurance and Asset Management

## WORKFORCE:

700 benefits-eligible employees

### THE PROBLEM:

With no easy way to coordinate the schedules of all associates at their 24/7 call center, Allianz's one-person benefits team had to hold 12 meetings during the two weeks of open enrollment every year.

### THANKS TO ALEX:

- 12 open enrollment informational meetings were eliminated and replaced by two short Q&A sessions
- 739 unique ALEX visits for 700 employees

*"This explained everything very well. Before ALEX, I never felt like I actually understood the coverage or options."*

#### Employee

Allianz Global Assistance

### ALLIANZ'S OPEN ENROLLMENT COMMUNICATION STRATEGY:

- Put benefits page and banner ads on company intranet
- Sent postcards with a link to benefits page to every employee
- Sent email to all employees one week before OE began
- Displayed an ALEX-focused message on TV monitors throughout the office
- Placed five-foot-tall ALEX standee in strategic locations
- Hosted benefits fair during the middle of open enrollment

### ALEX USAGE RATE:

# 105%\*

*\*How is a number like this even possible? Not only did their employees flock to the tool, they (and their partners) returned multiple times.*



# Extra Space Storage

## INDUSTRY:

Transportation

## WORKFORCE:

3,100 benefits-eligible employees

## THE PROBLEM:

Extra Space Storage wanted to move more of their workforce to their High Deductible Health Plan (HDHP).

## THANKS TO ALEX:

The company's HDHP enrollment rate went from 30% to 65%, beating their consultant's most aggressive forecasting number of 61%.

*"Without ALEX, we never would have been able to double our HDHP enrollment. ALEX was the voice of our open enrollment and opened everybody's eyes to what open enrollment is."*

**Debra Gomez**

Total Rewards Benefits Senior Manager

## EXTRA SPACE STORAGE'S OPEN ENROLLMENT COMMUNICATION STRATEGY:

- Sent automated voice mails from top executives to help promote ALEX
- Sent emails and placed banner ads on the company intranet
- Placed five-foot-tall ALEX standee in strategic locations
- Sent postcards to employees' homes
- Published an open-enrollment-related article in the company newsletter
- Put up fliers and handed out business cards with important enrollment info to employees
- Showed demos of ALEX during video conference calls

## ALEX USAGE RATE:

# 264%\*

*\*How is a number like this even possible? Not only did their employees flock to the tool, they (and their partners) returned multiple times.*



# Thales USA, Inc.

**INDUSTRY:**

Manufacturing

**WORKFORCE:**

3,000 benefits-eligible employees

**THE PROBLEM:**

Thales hoped ALEX could help push 15% of their employees to their new HDHP and get more employees to contribute to their HSA, either to help them pay for health care expenses or as a secondary retirement vehicle.

**THANKS TO ALEX:**

More than 25% of employees migrated to the new HDHP, and the average HSA contribution was \$1920, well above the national average.

*"I was very, very pleased with the HSA adoption in the first year, especially for a brand-new product."*

**Jacob Mangin**  
Country Benefits Manager, Digital Transformation

**THALES USA, INC.'S OPEN ENROLLMENT COMMUNICATION STRATEGY:**

- Sent emails to all employees
- Showed demos of ALEX in all 30 in-person benefits meetings and webinars
- Put up posters and fliers around the office
- Sent the ALEX Benefits Sneak Peek video to all employees in advance of open enrollment
- Put banner ads on the company intranet
- Handed out business cards with important enrollment info to employees

**ALEX USAGE RATE:**

**121%\***

*\*How is a number like this even possible? Not only did their employees flock to the tool, they (and their partners) returned multiple times.*

# Links to More Resources

This playbook is but one of many online resources we've created for benefits professionals like you. Here is some other content we hope you'll find useful:

## ALEX Communication Tutorial Videos



### Transforming Boring Benefits Emails

JUSTYN HARKIN



### 5 Presentation Tips for HR Pros Who Hate Giving Presentations

KRIS DUNN



### What Makes a Great Benefits Postcard

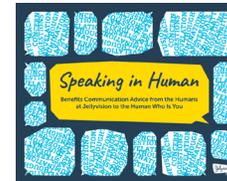
JUSTYN HARKIN

## ALEX eBooks



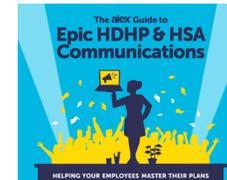
### 9 Tips for an Engaging, Readable, Not-Boring Benefits Guide

JELLYVISION



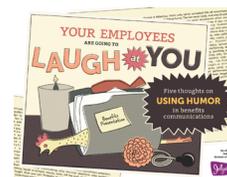
### Speaking in Human: Benefits Communication Advice from the Humans at Jellyvision to the Human Who Is You

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### The ALEX Guide to Epic HDHP & HSA Communication: Helping Your Employees Master Their Plans

JELLYVISION



### Your Employees Are Going to Laugh at You: Five Thoughts on Using Humor in Benefits Communication

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## ALEX Webinar Recordings

### [9 Tips for Using Humor to Make Benefits Communication Way More Engaging \(and Effective!\)](#)

Benefits communication expert David Daskal shares 9 tips you can use today to build (or build on) a year-round benefits communication strategy that incorporates work-appropriate humor to get the results you want.

### [7 Tips for Communicating Benefits to Millennials and Gen-Z All Year Long](#)

Jellyvision communication expert Elizabeth Archer shares seven tips to get Millennial and Gen-Z workers to perk up for your benefits messaging year-round. Vivint Solar's director of compensation and benefits Casey Lund talks about his on-the-ground experience trying to reach the Millennials at his company.

### [9 Low-Cost Technology Hacks to Help You Modernize Your Benefits Communication](#)

Lacy Campbell from Jellyvision shares 9 free or nearly free hacks for improving your benefits communication, including strategies for using survey tools and social media to your advantage; tips on improving your emails and PowerPoints; and pointers on identifying the right HR tech solutions for your company.

## ALEX Blog Posts



### [6 Memes About Open Enrollment That'll Make You Smile](#)

ALI MURRAY



### [New ALEX Drove \\$119 Million in Potential Tax Savings Last Year](#)

MARK RADER



### [What I've Learned: 5 Tips on Delivering Benefits Bad News](#)

DAWN BURKE



### [6 Tips on Conducting an OE Post-Mortem That Gets Results \(and Doesn't End in Tears\)](#)

DAWN BURKE



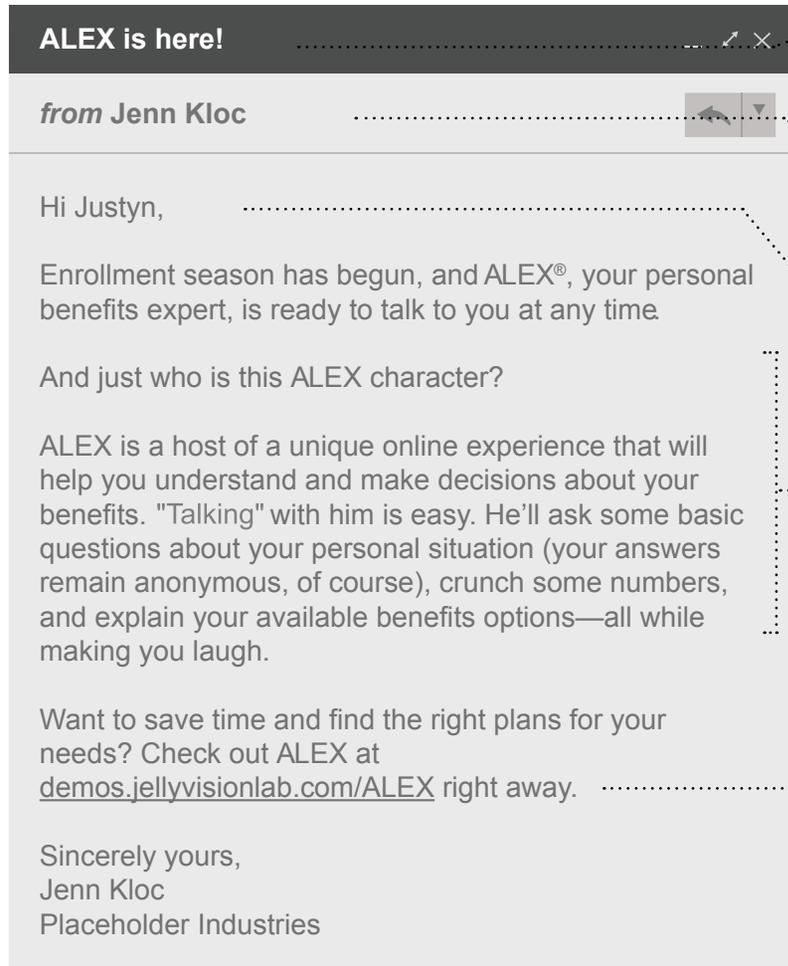
### [3 Tweaks You Can Make to Your HSA Communications to Boost Enrollment and Contributions](#)

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# SAMPLE OPEN ENROLLMENT CONTENT

# Sample Email

## Sample Open Enrollment Announcement Email



**SUBJECT LINE:** Keep your subject line short and descriptive—ideally fewer than 35 characters, including spaces.

**SENDER FIELD:** Think about whom your email will be "from." Will it be yourself or something like "The Company Benefits Team"? Whatever you choose, go with a name your employees recognize and trust.

**GREETING:** If it's possible to customize your greeting to individual employees, do so. People are more likely to read an email if it was written for them instead of a group of people.

**TONE:** The best email writing is conversational and informative. It's OK to use a little humor, but don't be too breezy. You want employees to feel like you're taking their benefits decision-making challenges seriously.

**CALL TO ACTION:** This is what you want employees to do as a result of reading the email (in this case, to go use ALEX). Example CTAs include: "Click here for more information"; "Save this date"; and "Go to this link to get started"

## Sample Email (Continued)

### NOTE TO NON-ALEX USERS:

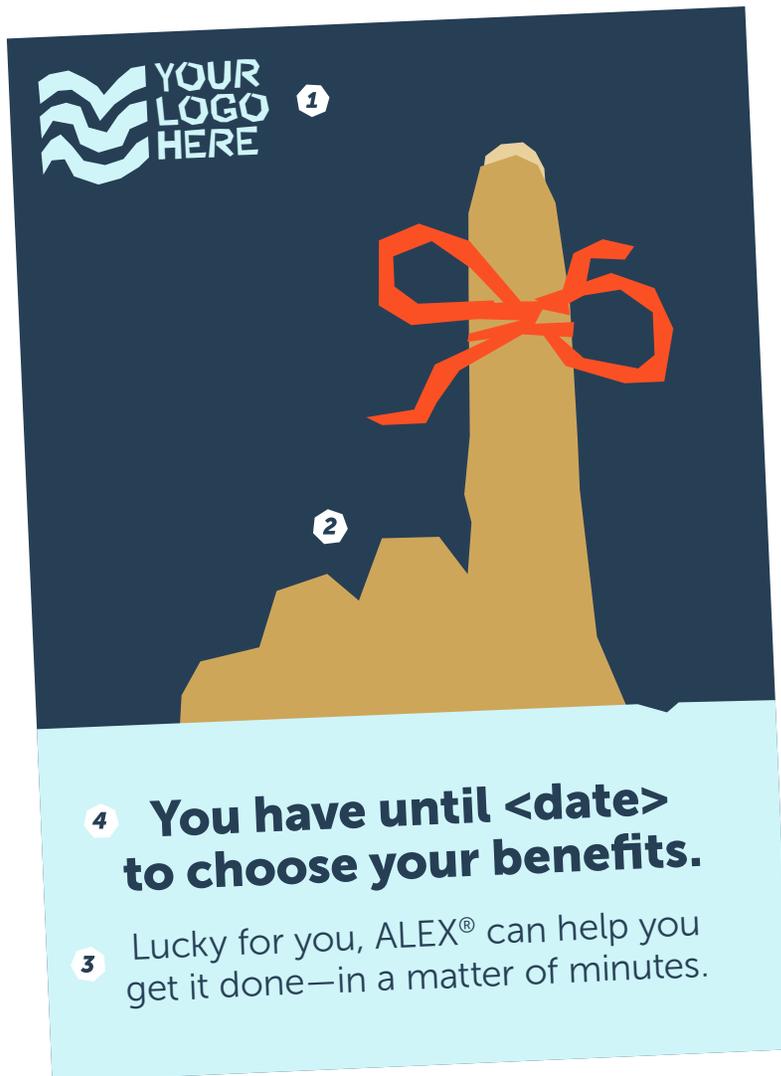
In addition to providing the basics and a call to action, you might consider listing out the top five FAQs you anticipate people having—or linking to that content elsewhere.

Also, if you have a mess of things that are too complex or numerous to be summarized in a sentence, consider using easy-to-scan bullets.

- Begin every bullet with the same part of speech and grammatical form. (Good: Check out this link; fill out these forms; email me with questions. Not good: Check out this link; forms you should know; email me with questions.)

- Avoid using sub-bullets. Adding another layer or two of complexity defeats the purpose of bullets.
- If you can, keep your bullet points symmetrical (one line each or two lines each); it looks better and is easier to digest.
- Put the most important items in a bulleted list first and last in your list; people tend to remember information in those spots best.

# Sample Postcard



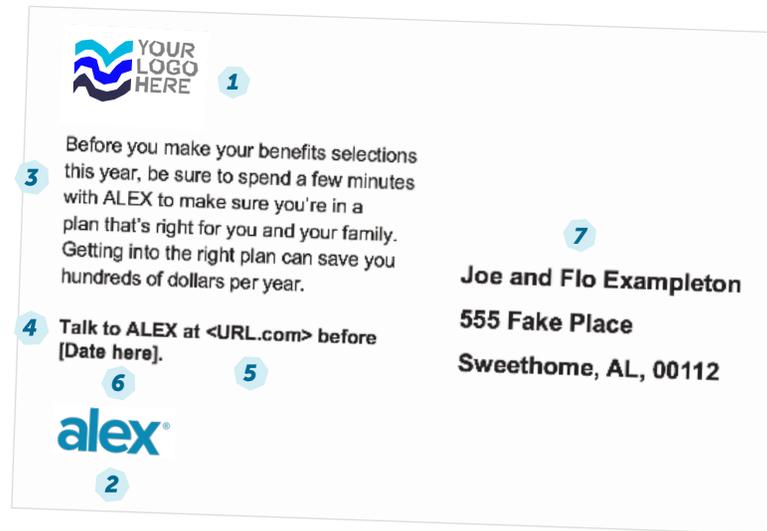
## FRONT

- 1 COMPANY LOGO:** Make sure your company's logo is displayed prominently. Doing so will distinguish your postcard from the metric ton of junk mail that people get—and throw away—every day.
- 2 INTERESTING VISUAL:** The best postcards have unexpected and eye-catching visuals. "Eye-catching" doesn't have to be silly or gimmicky—it just has to capture the attention of the person who's supposed to read it.
- 3 TONE:** Your postcard's combination of words and images should work together to establish tone. We recommend going with something that's friendly and approachable.
- 4 TIME FRAME:** Provide specific dates to let employees know that they're working within a very short time frame. This creates a sense of urgency.

## NOTE TO NON-ALEX USERS

Follow the same design and copy principles but include the URL that allows you to directly choose benefits instead.

## Sample Postcard (Continued)



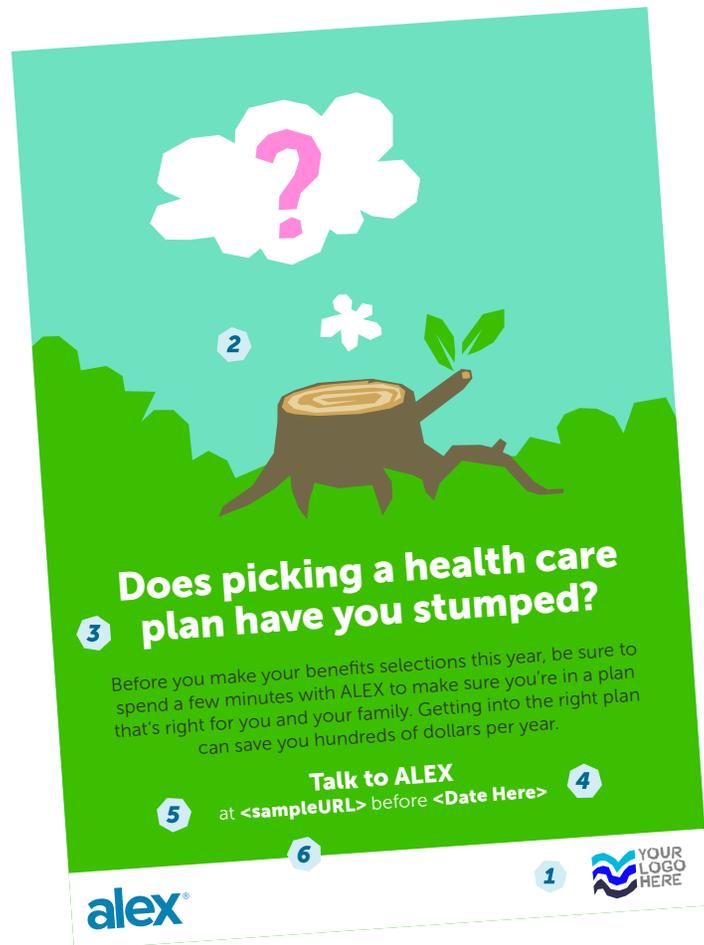
BACK

### NOTE TO NON-ALEX USERS

Remove Item #2. The “What” here (#3) would state where to find any online or printed resources, and a CTA link (#4) to where to actually enroll in benefits.

- 1 COMPANY LOGO:** Think of this as junk mail insurance—putting your logo on both sides of the postcard can prevent it from ending up in the trash.
- 2 ALEX LOGO:** If you’ve been promoting ALEX in other channels (flyers, posters, website banners), then the logo will be familiar and eye-catching. And if your employees are seeing this logo on the postcard for the first time, they’ll know what they’re looking at when they see the ALEX logo in your company’s version of the conversation.
- 3 THE “WHAT”:** Provide a one-sentence synopsis of what ALEX can help employees do. Something like: “ALEX is a smart, funny benefits expert who explains your benefits options in plain English, and helps you choose what’s best for you.”
- 4 CALL TO ACTION:** This is what you want employees to do as a result of reading the postcard. (in this case, to go use ALEX).
- 5 EASY URL:** Ideally, the postcard would include a short, simple, public-facing URL employees or their family members can use to go straight to ALEX. If that’s not possible, add in the most direct route possible.
- 6 TIME FRAME:** Emphasize the time frame message from the front of the card. That sense of urgency might be what it takes to get the person who receives it to turn the card over to see the front.
- 7 ADDRESSEE:** If it’s possible to address your postcard to employees and spouses, you should do so. If not, consider something like “Jane Smith & Family.” Inviting family members to use ALEX is a great way to increase usage of the tool.

# Sample Poster



## FRONT

- 1 COMPANY LOGO:** Make sure your company's logo is displayed prominently.
- 2 INTERESTING VISUAL:** The best posters have unexpected and eye-catching visuals. "Eye-catching" doesn't have to be silly or gimmicky—it just has to capture the attention of the person who's supposed to read it.
- 3 TONE:** Your poster's combination of words and images will work together to establish the overall sense of tone. We recommend going with something that's friendly and approachable (i.e., not snarky or overly wacky).
- 4 TIME FRAME:** Be sure to provide specific dates to let employees know that they're working within a very short time frame. This creates a sense of urgency.
- 5 CALL TO ACTION:** This is what you want employees to do as a result of reading the poster (in this case, to go use ALEX).
- 6 EASY URL:** Ideally, the poster would include a short, simple, public-facing URL employees or their family members could use to go straight to ALEX. If that's not possible, add in the most direct route possible.

## NOTE TO NON-ALEX USERS

Take an extra five minutes to choose an image for your posters that goes beyond typical stock photos. You know, the ones of laughing businesspeople. Or focused businesspeople staring at a computer. Or clip art of a heartbeat monitor.

# Sample Intranet Banners



## Sample copy for non-ALEX OE intranet banner ads:

Are you sure last year's plans are still saving you money?

It pays to double check.

**[Start now]**

Don't default into a plan you don't want.

Pick your 2019 benefits before [Month, Day]

**[Start now]**

The time is now!

Pick your 2019 benefits before [Month, Day]

**[Start now]**



**Before you go: please enjoy  
our not-actually-famous  
recipe for...**

# **BENEFITS-IAL BODY SCRUB**

- 1/2 cup Tax Savings Sea Salt
- 1/2 cup Co-Pay Coconut Oil
- 1 cup Ground Coffee (from the pot made at 3pm upon realizing you'll be working late)
- 1/2 Tbsp Cinna-Money Saved
- 1 Tbsp Vanilla Extract-Me-From-This-Office-Chair

**Mix all  
ingredients together  
and use on hands or in  
the shower to wash away  
every last memory of OE.**

# ALEX Solves Problems

## Promote Benefits Education

*From reaching hard-to-reach employees to driving HSA participation to promoting savvy healthcare consumption, ALEX has you covered.*

### Benefits Counselor

Give your employees the personalized guidance they need to make the best possible benefits decisions for themselves, their families, and their bank accounts.

### Benefits Sneak Peek Video

Drive home your company's most important open enrollment messages, introduce new hires to their key to-dos, and drive traffic to ALEX.

### Retirement

Get your employees to participate in your 401(k) and HSA—or to increase their current contributions.

### Making The Most Of Your Plan

Give your employees practical advice on how to use their health insurance plans.

## Communicate Leave More Effectively

### Leave of Absence

Guide your employees through the entire leave of absence process with practical guidance and personalized information.

## Support Financial Health

### Financial Wellness

Promote your financial wellness offerings, help your employees improve their sense of wellbeing, and encourage meaningful behavioral change.

### How much do these ALEX products cost?

All of our ALEX products are priced based on the number of employees you have at your company.

To get more helpful benefits tips delivered straight to your inbox, [sign up for our monthly newsletter, The Conversation Starter.](#)



## About Jellyvision

Jellyvision is an award-winning technology company whose interactive software talks people through important, complex, and potentially snooze-inducing life decisions—like choosing a health care insurance plan, saving for retirement, or navigating a leave of absence—in simple, fun, and engaging ways. Our recipe: behavioral science, purposeful humor, mighty tech, and oregano.

## About ALEX®

Our SaaS employee communication platform ALEX is used by more than 1,000 companies with more than 17 million employees in total—including 106 of the Fortune 500 and one-third of the country's 25 largest companies. ALEX helps employees at these companies, whose health insurance premiums total more than \$110 billion, make better decisions about their insurance plan options, 401(k) allocations, and financial wellness.

**YOU CAN'T SPELL HORROR**

**WITHOUT**





## YOU CAN'T SPELL HORROR



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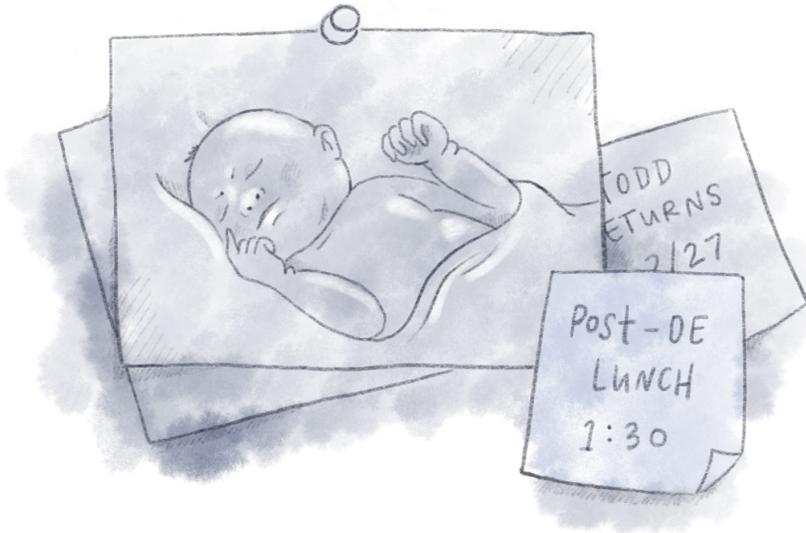
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**alex**<sup>®</sup>

# He's Baaaaaaack



It was a regular Monday morning in the HR Cave: phones rang, keyboards clicked, everyone got an email containing 36 pictures of Todd in Accounting's baby.

"Todd still has a month of paternity leave left," mused Will.

"How many more daily picture blasts are we going to get?"

"A month's worth," chuckled Eva.

The HR Crew was scrambling to finish all their work before they went out for a team lunch at 1:30. They'd just wrapped up Open Enrollment, and it was time to party.

"This is going to be the best post-OE feast ever!" Sam squealed as she reviewed Le Restaurant's six-course lunch menu.

Will nodded excitedly, but Eva looked a little uneasy.

"What if something comes up this morning?" she asked.

"Eva. Open Enrollment is DONE. Finished! Don't even worry," said Will.

"I know, I know," Eva replied. "I guess I just feel kind of weird today. Like something bad is going to happen."

Sam and Will exchanged looks. Whenever Eva thought "something bad" was going to happen (which was often), it never did.

Sam grinned reassuringly. "It's going to be great, Eva. Don't worry. Nothing will stop us from lunching!"

Eva tried to smile but could only muster a grimace.

"Totally," she replied.

\*\*\*

The three of them barely looked away from their computers all morning. Then, at around ten o'clock, Eva's head whipped around.

"What was that?" she asked.

"What was what?" replied Will.

"Footsteps! Heavy footsteps."

"We always hear footsteps," Sam said. "One hundred and fifty people work here. That's 300 feet."

"I know, but these footsteps were going towards Todd's office."

"No one goes to his office while he's away," said Will, reassuringly.

"I'm telling you, I heard it!" Eva said.

Sam looked down the hall. Empty. Todd's office door was still closed, his "On Pat Leave 'Til December!" note taped to it.

"No one's out there," Sam said as she sat back down.

Will and Sam looked at each other. Oh, Eva.

\*\*\*

Eleven o'clock rolled around, and Will found himself alone at his desk, putting the finishing touches on his onboarding presentation. Eva and Sam were leading an office-wide HR meeting in the downstairs conference room. Will liked having the office to himself so he could unplug his headphones, play his music out loud, and sing along.

Will had just pressed "play" on his '90s mix when he heard something from the hallway. Was someone...humming? He paused "Kiss from a Rose" and listened.

Silence.

Will got back to singing and typing, but just as Vanilla Ice demanded that everyone stop, collaborate, and listen, he heard it again. Someone was out there, singing along.

He got up and looked around; no one was back from the meeting yet. Will wandered from room to room, trying to find the source of the singing, but his search was fruitless.

As he was about to return to the HR Cave, he heard a crash from the kitchen and yelped. He tiptoed down the hall to check out the noise when, suddenly, the door to a conference room flung open.

"WILL BUDDY!" bellowed Greg from Sales. "I've got some questions about my FSA...can I pick your brain for a second?"

"Sure, I guess," Will said, as he followed Greg down the hall. The kitchen sounds would have to remain a mystery.

\*\*\*

The clock struck noon, and the HR Crew was still hard at work. The rest of the office left to try the new ramen place next door, and soon it was deathly silent. At one o'clock, Will, Eva, and Sam started to put their jackets on to leave for their lunch celebration, when a loud



*creeeeeeak* sounded from down the hall. They froze and looked at each other. Sam crept towards the door, looked down the hall, and gasped.

"There's someone in Todd's office!"

"Who?!" whimpered Will.

"I don't know!" Sam whispered. "But Todd's still on leave!"

"I KNEW those footsteps were bad news!" wailed Eva.

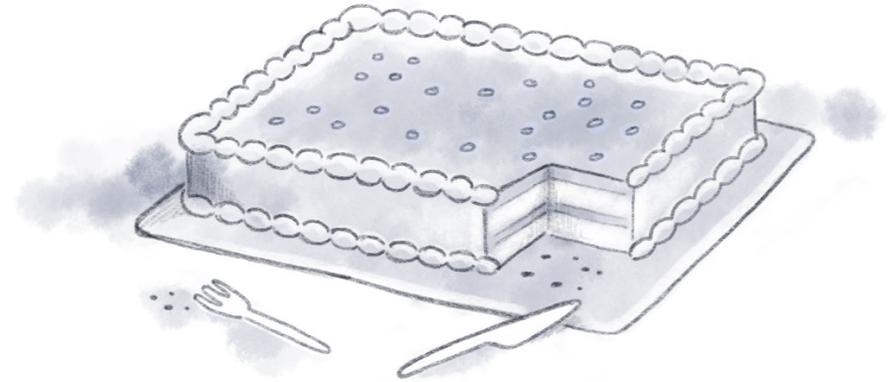
The HR Crew looked at each other, worried.

"We need to check it out," declared Sam.

"We need to leave now to be on time for lunch," said Will, stomach grumbling.

"We've still got time," replied Sam. "Plus, since when is the HR Crew afraid of anything?"

# The Case of the 401(k) nightmares



Sam crept forward slowly, with Will and Eva timidly following behind.

Before they could peek into Todd's office, the door swung open. Eva's heart pounded. It was all she could do not to scream. There stood Todd, beaming.

After a long silence, Sam finally managed a response.

"What are you doing here?" she squeaked.

"Oh hey, guys! Good to see you!" said Todd. His tie said "Super Dad" on it.

"Todd! You still have a month of leave left!" exclaimed Will.

"Ah, yeah...I decided to come back early."

The three of them stared at each other, horrified.

Eva frowned. "You didn't give notice, and now we have only two days to get all your 'returning to work' paperwork done."

"Paperwork, shmaperwork! I figured I'd just show up, you know? No need to be so formal!" Todd chuckled. "Okay, well, glad to be back, guys! I'm off to lunch!"

Todd walked out, leaving the HR Crew with their mouths hanging open. Sam was pale and trembling. "I must be dreaming. This can't be happening."

"It IS happening," intoned Eva, solemnly.

"But...he didn't give us notice!" Sam sobbed. "He can't just show up here like that! We have two days—LESS than two days, now—to do everything."

They gazed at each other, haunted looks in their eyes.

"He's back, Sam," Will whispered. "And there's nothing we can do about it."

He picked up his phone and dialed, his fingers trembling.

"Hello," he said gravely. "I have a reservation at 1:30 I need to cancel..."

Every Friday afternoon, the HR Crew picked up a grocery store sheet cake to eat in the office kitchen. As their forks hovered over the remains of this week's confetti cake, Cora from IT walked in, glancing nervously over her shoulder.

"Cora! Happy Friday!" called Will, wiping the frosting off his fingers.

She walked past them to the fridge, opened it, and stared inside, never turning to look at Will.

"Cora?" started Eva.

Cora stared blankly into the fridge, not moving.

Sam walked over and tapped Cora's shoulder.

"AHHHHHH!" Cora screamed, slamming the fridge door shut.

“Oh my gosh, sorry!” stammered Sam, “I just wanted to make sure you were okay..you seem...”

“Not okay,” offered Eva.

Cora turned to face Sam, and even from their table, Will and Eva could see the deep purple circles under her eyes.

“I’m sorry, Sam. I just...I haven’t slept well in weeks.”

“Oh no! What’s wrong? Are you all right?” asked Sam. Cora shook her head “no”, her eyes darting around the room, looking for something (or someone).

“You wouldn’t believe me if I told you,” sighed Cora.

“Try us!” they chimed in unison.

Cora scanned the room, and once she decided it was safe to talk, she took a deep breath and began.

“For the last month, every night at midnight, I’ve woken up to see a figure standing over my bed.”

“A figure?” inquired Will.

“A ghost,” declared Cora.

Will whimpered. Ever since he solved the case of the poltergeist in the hallway printer, he’d been doing whatever he could to avoid ghosts.

“What kind of ghost?” asked Eva.

“That’s the crazy part,” mused Cora, as though in a trance.

“She’s me. But like, a 65-year-old version of me.”

The HR Crew gaped.

“What does she...I mean you...I mean...what does the ghost want?” asked Sam.

“I don’t know. She just wags her finger at me angrily, and then walks away mumbling.”

“Mumbling what?!” exclaimed Sam and Eva.

“Meeeeet the maaaaatch. MEEEEET THE MAAAAATCH!” That’s all she says, over and over.” Cora looked at

the HR Crew members, one by one. “Last night, I finally got up the courage to ask her what she meant.”

“What did she say?!” asked Sam and Eva. Will looked like he was about to faint.

“Just two letters...” Cora trailed off. The kitchen was deathly silent.

“H...R...”

Eva, Will, and Sam looked at each other, stunned. Cora’s face was as white as the buttercream icing they had just eaten.

“I just want it to stop,” she sobbed.

Suddenly, Eva had a thought.

“I think I know how to fix this,” she said.



One week later, the HR Crew was digging into a beautifully iced carrot cake when Cora skipped into the kitchen, her smile wide, her eyes shining.

“I just wanted to thank you for your help,” she grinned. “I haven’t slept this well in ages!”

“So...the ghost?” asked Will tentatively.

“Eva was right! As soon as I got home last Friday, I logged into my 401(k) account and increased my contribution amount to make sure I’m meeting our company match!”

The HR Crew couldn’t hide their excitement.

“And?” they asked.

“I haven’t seen future me since!”

Sam, Will, and Eva cheered. Cora high-fived them all, and then practically floated out of the kitchen.

“How’d you know it would work, Eva?” Will asked.

Eva looked at him, knowingly.

“I’ve been in this business long enough to know that when an older version of yourself haunts you, there are only two reasons: to scare you into saving more for retirement OR to stop you from getting an unflattering haircut.”

Sam and Will looked at Eva quizzically.

“...and since Cora’s ghost was talking about meeting the match, I figured it was 401(k)-related. Plus, Cora’s hair always looks amazing.”

“Well,” chuckled Sam, “looks like another victory for HR! You know what this calls for?”

They looked at each other gleefully. Then, at the same time, they all shouted: “Cake!”

# Red Tape



It was a Tuesday halfway through Open Enrollment, and Sam was working alone: Will was at his sister’s wedding in Phoenix, and Eva called in sick with the flu. Sam’s stomach dropped as she walked into the HR Cave. There, sitting on Will’s desk, was a pile of paperwork almost as tall as Sam with a Post-it on it that read: *Thanks for scanning and faxing these for me, Sam. They’re due Tuesday. -Will.* Sam slumped down the hall to the scanner and got down to work.

An hour and a half later, as she slid into her desk, a loud *Riiiiing!* ripped through the silence. She ran to Eva’s desk and

answered it. Before she could say “Sam speaking,” the phone from Will’s desk started ringing too. She put the first call on hold and ran to Will’s phone, when suddenly Eva’s phone and her own phone rang in unison. Fighting back tears of frustration, Sam hustled back and forth between the three desks, answering an endless string of benefits questions. Meanwhile, her computer chimed with a non-stop stream of ghoulish email notifications.

By the time lunch rolled around, Sam’s voice was hoarse and her nerves frayed. She was absolutely starving, so she ducked out to grab a sandwich. She felt better as she returned to work, BLT in hand. The door to the HR Cave was closed, which was strange: the HR Crew’s open-door policy was usually quite literal. She swung the door open and screamed: every object in the Cave was wrapped tightly in thick red tape.

Heart racing, Sam slammed the door shut, grabbed a pair of scissors, and scurried around trying to cut through the crimson cocoons. As she was slicing through the tape on the filing cabinet, she felt something coil around her feet. A roll of red tape was wrapping itself quickly up her legs like a boa constrictor!

“Help!” she cried. But no one answered. The tape was up to her knees. Sam tried to make her way to the door to flag someone down, but the tape quickly spun around her torso, fastening her arms to her sides. It was up to her neck, and she tried screaming for help one more time, but the tape slithered across her mouth. Just then, a loud noise sounded.

*BEEP. BEEP. BEEP.*

Sam’s eyes popped open. She was in her bedroom, safe! It had just been a bad dream!

Relieved, Sam skipped out of bed and into the kitchen. She reached into the cabinet to grab a coffee mug, and just then...her

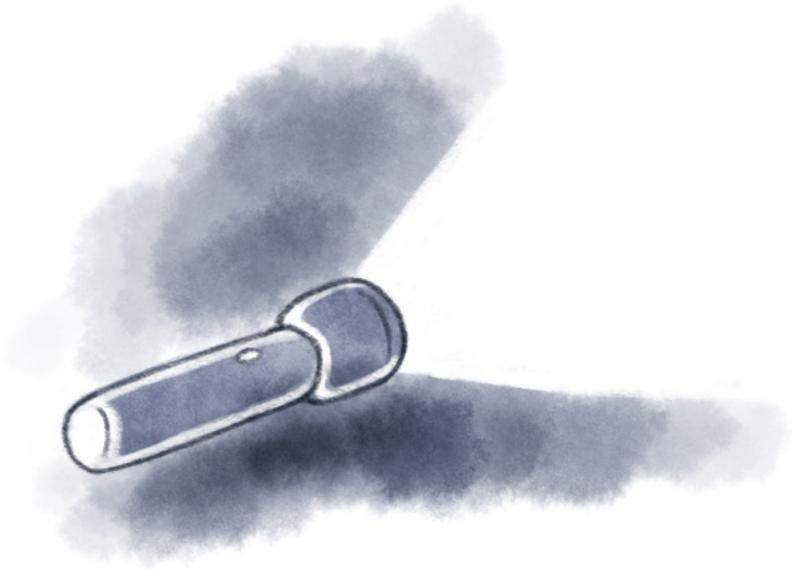
cellphone rang. As she picked it up, a string of email notifications chimed. But as she was reading her messages, she saw something strange below the phone. There, on her wrist, was a thick, shiny strip of red tape. She slowly peeled it off her skin, a knot in her stomach.

It had been just a dream...right?



**If your benefits communication challenges are keeping you up at night, ALEX can help.**

The best SaaS employee communication platform in the universe, ALEX saves HR leaders time and money by guiding employees through difficult health insurance, retirement savings, leave of absence, and wellness decisions. To learn more, please visit [meetalex.com](https://meetalex.com).



# You Can't Spell Horror Without HR

Join the HR Crew—Sam, Will, and Eva—as they investigate all of the mysterious events, spooky sounds, and scary scenarios that pop up in the office. It's all in a day's work for our fearless trio...after all, HR isn't for the faint of heart!