



# Employee Benefits Communication

## Calendar

A Guide on What to Say, When



# Employee benefits communication is vital

not only to your organization, but to your people.

Many employees don't fully understand their benefits offerings—in some cases, up to fifty percent. HR and benefits leaders understand that communication is key to educating employees on available offerings, but what to communicate (and when) continues to be a challenge.

## Let's start with a pulse check:

- Do your employees know what benefits your company provides?
- Do you communicate this to existing employees or is it something they only see during onboarding and open enrollment?
- Do you have a benefits communication plan to keep employees updated so they aren't lured away by competitors?

You spend a great deal of time and budget making sure employees have the very best benefits possible. So, wouldn't you want employees to have the best benefits information possible, as well? Of course—which is why mapping out your content can make a big difference in how your message is received. Our communication experts have weighed in on best practices to help you communicate and promote relevant benefits offerings to your employees—including what to say and when. Let's dive in!





# Tips for Getting Started

## Set Clear Business Goals

Remember to set S.M.A.R.T. goals: specific, measurable, achievable, results-focused, and time-bound. See the following examples to get an idea of some common goals to set.

- Increase enrollment in [specific plan] by \_\_\_%
- Increase usage of decision support tool by \_\_\_%
- Decrease inbound calls to HR by \_\_\_%
- Increase views on educational video by \_\_\_%
- Achieve \_\_\_% of enrollments by \_\_\_/\_\_\_/\_\_\_

## Understand Your Audience

When preparing your benefits communication strategy, it is important to take into account the different ways you can segment your audience. For example, you can segment your employee population based on benefits classes your organization has in place. Or, you can create different personas based on demographics, job profiles, plan or program eligibility, etc. Being thoughtful upfront about who you are trying to reach and what action(s) you are trying to have employees complete will help your benefits communication materials have maximum impact with your audience.

## Know What You're Asking Your Audience to Do

Each piece of communication should have a clear, concise call-to-action (CTA) that helps employees understand exactly what they need to know, or any next steps they need to take. Make sure to boil your message down to a few key points that help reinforce the actions you need employees to take in order to reach your goals. By focusing communication pieces around a clear CTA, you'll make benefits information relevant and benefits decisions easy to make for your employees.

## Choose the Right Way to Deliver Your Message

There are so many ways to deliver benefits messaging to employees—and selecting the right vehicle is incredibly important to the success of your communications. A few of our favorite channels include:

- Designated benefits communication websites
- Newsletters
- HTML email series
- Video
- Employee handbooks (print and digital)
- Slideshare presentations
- Jumbo (6×9") postcards



# Employee Benefits Communication Calendar

## JANUARY

### New Year, New Goals

Has your organization added new plans to your benefits offerings?  
Have there been any notable changes to existing plans or policies?  
Have you increased the employer match for 401(k) contributions?  
Take the “New Year, New You” approach to introduce what’s new and exciting with your programs.

### Open Enrollment Survey

You likely had specific enrollment goals going into this year’s Annual Enrollment. Measure those goals by delivering a brief open enrollment survey to both your benefits eligible employees and their dependents to identify what went right and what can be improved upon for next year.

### HSA vs. FSA

Employees may not realize the difference between HSAs and FSAs—particularly that HSAs don’t have a “use it or lose it” date. Take time during this first month of the year to reintroduce HSAs and FSAs to your workforce and the important differences.

## FEBRUARY

### Wellness Programs

Now that the excitement of a new year has settled, check in with your employees on how things are going, and remind them of your wellness program initiatives to help those resolutions stick. I.e. smoking cessation programs, weight loss coaching or gym membership reimbursement.

### Heart Health Reminders

February is American Heart Month. Share with employees what your organization is doing to advocate for a heart-healthy work environment, including that early detection is key and reminders to schedule an annual check-up.



## MARCH – APRIL

### **Stress Awareness Month / Employee Assistance Programs**

April has been recognized every year as Stress Awareness Month since 1992—and stress is no stranger to the modern workforce. This is an opportune time to use your communication channels to remind employees of EAP offerings, including an explanation of services offered and specific contact information.

### **Benefits of Telemedicine**

Flu season isn't over—making now an ideal time to highlight telehealth service options. Telemedicine is often discussed as an important way to help manage and reduce health care costs and can be a cost-effective healthcare option for employees to avoid leaving home when sick or spreading illness to others.

### **Urgent Care vs. The Emergency Room**

Urgent care centers are popping up across the country, but many employees don't know what makes them different from emergency rooms. Make sure to **communicate the differences** with your employees, which boils down to the severity of the health problem and affordability. If the condition is life-threatening, go to an emergency room. If the condition is a minor illness or injury, take advantage of the convenience and affordability of urgent care. They'll also be happy to know most urgent care facilities accept insurance!

### **Voluntary Benefits Education**

If your organization offers voluntary benefits, it's likely there are employees who aren't using them—but should. Successful communication is key to driving engagement with benefits, both core and voluntary. Make time throughout the year to remind your workforce of these exciting perks they could be missing out on.





## MAY – JUNE

### **Mental Health Awareness Month**

According to the National Alliance on Mental Illness (NAMI), 1 in 5 adults in the United States experiences mental illness each year—and these experiences may have an impact on everyday activity, including work. Utilize your communication channels to provide information on the mental health benefits options your company offers.

### **Men's & Women's Health Month(s)**

Believe it or not, many employees don't get regular health-screenings—even when benefits plans cover annual physicals. Use Men's Health Month and Women's Health Month to clearly communicate your core benefits offerings and encourage wellness checks amongst your workforce.

### **Voluntary Benefits: Employee Discounts**

Who doesn't love a good discount? If your organization offers voluntary benefits that include discounts to local and/or national vendors, your employees won't mind the reminder on how they can save money on the things they love.

## JULY-AUGUST

### **Life Events: How and When to Make a Change**

A lot can change throughout the year—but remembering to make these changes to your benefits plan can fall through the cracks for many employees. Distribute a pulse check in late summer with detailed instructions on what qualifies as a life event and how to make the change in your benefits portal.

### **Voluntary Benefits: Lifestyle**

Give your voluntary lifestyle benefits program a boost! All employees are experiencing different milestones at different times, and that may not have been useful three months ago may be of importance now. Dedicate time throughout the year to keep employees up to date on the lifestyle benefits available and how to participate.

Looking for  
inspiration?

Check out our **[blog](#)**:



## SEPTEMBER – NOVEMBER

### **Getting to know your Open Enrollment portal**

Map out an email cadence that starts 1-2 months before open enrollment. This may also be accompanied by print materials such as flyers and posters, or mailed pieces like postcards. In these communications, it's important to discuss not only the timeframe of open enrollment, but how and where to enroll—including information about the technology platform your organization uses with visual components to demonstrate the ease of enrolling.

### **Voluntary Benefits: Supplemental Health**

With healthcare-related expenses being a cause of financial stress for employees, supplemental health insurance offerings can be the lifeline an individual and/or their families rely on. Seeing that supplemental health benefits can protect out-of-pocket expenses, communicating these offerings, and often, shows your investment in employee well-being.

## DECEMBER

### **FSA/HSA Funds**

In most cases, employees have until December 31st to spend any remaining FSA balance. In other words, by the time the ball drops on New Year's Eve, any money left in the account will be forfeited. With the excitement of the holiday season and anticipation of a new year, missing the deadline isn't uncommon. Be an advocate for your employees and send out reminders first thing in December! And for employees with an HSA, all funds carry over from year to year.



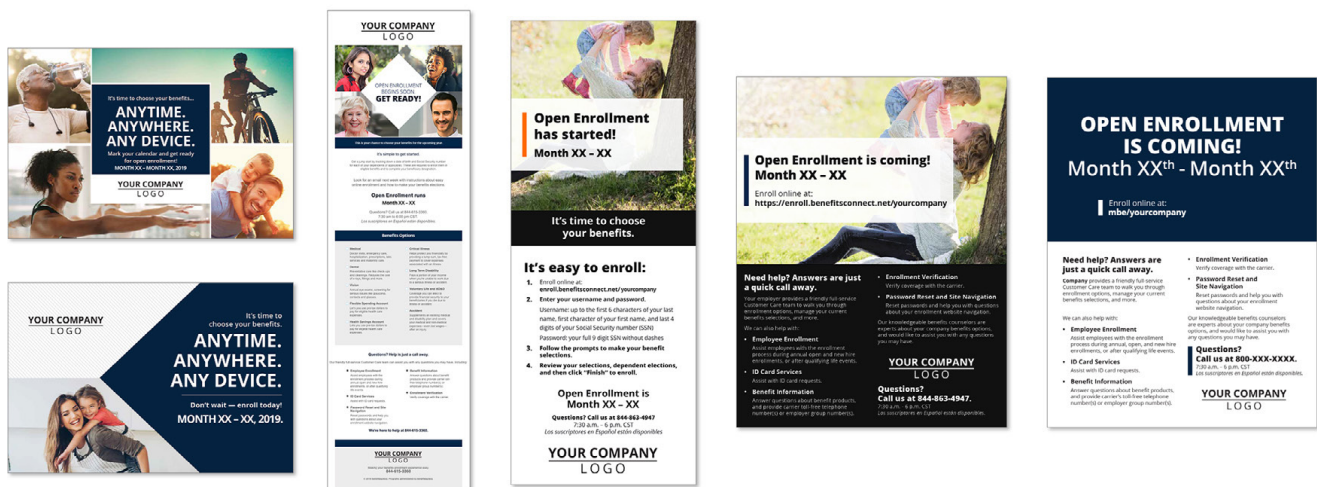


# Kick-start your benefits communication strategy

HR and benefits professionals know there is no shortage of benefits communication topics—but how and when to communicate along with preparing an action plan is where it can get tricky.

We understand the importance of keeping communication at the forefront of your organizational strategy. WEX offers a suite of

services that will make communicating with your staff easier than ever. Whether it's open enrollment campaigns, benefits microsites, direct mail pieces or email communications, the benefits and communication experts at WEX can provide a range of strategic communication services for all client sizes and budgets.



Learn more about how WEX can take your employee benefits communication strategy to the next level.

**Visit our website**





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