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Open Enrollment Strategy Guide

A smarter strategy for busy HR teams who want better enrollment, without the chaos.

OE doesn't have to feel like chaos

You've run OE before, this isn't your first rodeo. But if you're like most HR teams, you're still spending too much time managing micro sites, printing guides, chasing approvals, and answering the same questions over and over again.

This guide gives you a better way to run open enrollment. We'll break down what to focus on before, during, and after OE to make sure your strategy is aligned, your time is well spent, and your employees actually enroll with confidence.

You don't need more tools. You need a tighter, smarter communication plan.

Why OE Strategies Fall Short

Most open enrollment strategies don't fail because HR teams aren't trying — they fail because the approach is reactive, tool-heavy, and overly focused on logistics. Relying on a single communication channel, launching too close to the enrollment window, and assuming employees will "just get it" all contribute to underwhelming engagement. On top of that, many teams equate more tools with more value, when in reality, what's needed is a tighter, smarter communication plan. This guide is designed to help you shift away from last-minute scrambling and into a more intentional, high-impact strategy.

Who This Guide Is For

This guide is built for HR and People leaders who've been through the OE grind before — the ones who've managed micro sites, created endless PDFs, and still ended up answering the same employee questions on repeat. If you're ready for something more effective, if you want employees to actually understand and engage with their benefits, and if you're looking for a way to streamline communications across print, email, SMS, and digital — this guide was made with you in mind.

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PRE-ENROLLMENT PHASE

Set the stage before enrollment starts.

The biggest mistake most teams make during OE? Waiting too long to communicate. By the time enrollment opens, employees are already behind, scrambling to understand changes, weigh options, and make decisions under pressure. A strong pre-enrollment strategy flips that dynamic. It creates space for education, lets people absorb key details gradually, and dramatically reduces last-minute confusion. That means fewer fire drills for HR, better engagement from employees, and a smoother path to confident, on-time elections.

Key Goals:

- Build awareness of key dates and tools.
- Generate early interest and education around benefits before OE starts

Checklist:

- ○ Launch a teaser campaign (email, Slack, flyers, etc.).
- ○ Share a clear OE calendar and timeline.
- ○ Send a “What’s Changing This Year” overview.
- ○ Give early access to guides or walkthroughs.



Pro Tip:
Use multichannel messaging (email, print, Slack, text) to reach people where they actually pay attention — not just where it’s convenient.

See next page for pre-enrollment calendar →

Pre-enrollment Calendar

Email · Video · SMS · Internal · Print

September 2027

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19 Post signage with QR code linked to benefits guide in all locations	20
21	22 **Email** Announcing OE dates with link to benefits education guide	23	24 **SMS** OE dates with link to benefits education guide	25	26 **Email** Step by step: How to prepare for OE	27
28	29	30 **SMS** Step by step: How to prepare for OE				

October 2027

			Oct 1 Video via SMS/Email Show a short video tutorial on how to navigate benefits education guide	2	3 **Email** FAQ and contact info for assistance	4
5	6	7 **Email** OE around the corner	8	9 **Email** Fact based email urging to educate yourself for OE link to benefits guide	10 Update signage and post at all locations with “OE is here” messaging	11

DURING ENROLLMENT PHASE

Make decisions easier, not harder.

Open enrollment isn't just about getting forms submitted — it's about helping employees make decisions they actually feel good about. This is the moment when all the prep pays off. If your pre-enrollment efforts built awareness, now is your chance to reinforce clarity. During OE, employees need timely reminders, easy-to-understand resources, and support that meets them where they are. When your communication is accessible and actionable, HR spends less time answering questions and more time driving results.

Key Goals:

- Reduce confusion.
- Drive confident selections.
- Support high-value plan adoption.

Checklist:

- ○ Send benefit guides with built-in decision support (calculators, videos, FAQs, easy to digest information).
- ○ Personalize by employee type or location.
- ○ Offer office hours, live chat, or virtual Q&A.
- ○ Reinforce deadlines and urgency with multiple reminders

Pro Tip:
Make sure employees don't have to dig through a portal or micro site to get the info they need. Direct access = higher engagement.

See next page for OE calendar →

Open Enrollment Calendar

Email Video SMS Internal Print

October 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			Oct 1	2	3	4
5	6	7	8	9	10	11
12	13 **SMS** OE kick-off. What to do **Email** OE kick-off. What to do	14	15 **SMS** Emphasize enrollment deadlines and avail. resources	16	17 Video via SMS/Email Show a short video tutorial on how to navigate benefits education guide	18
19	20	21 **Email** Mid OE email reminder	22 **SMS** Mid OE reminder	23	24	25
26	27 **SMS** Final reminder **Email** Final reminder	28	29	30	31	

POST ENROLLMENT PHASE

Reinforce choices. Minimize questions.

Open enrollment isn't just about getting forms submitted — it's about helping employees make decisions they actually feel good about. This is the moment when all the prep pays off. If your pre-enrollment efforts built awareness, now is your chance to reinforce clarity. During OE, employees need timely reminders, easy-to-understand resources, and support that meets them where they are. When your communication is accessible and actionable, HR spends less time answering questions and more time driving results.

Key Goals:

- Improve confidence in elections.
- Reduce HR follow-up and support tickets.
- Set the stage for ongoing education.

Checklist:

- Send confirmation messages with next steps.
- Share how-to's (e.g., using FSA/HSA, ID cards, etc.).
- Promote key resources like EAPs or wellness tools.
- Have a post-mortem and discuss annual edu plan

Pro Tip:
Don't stop communicating just because OE is over. Reinforcement drives value.

See next page for post-enrollment calendar →

Post-Enrollment Calendar

Email Video SMS Internal Print

November 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4 **SMS** Survey on OE experience **Email** Survey on OE experience	5	6	7	8
9	10 **Email** How to maximize selected benefits	11	12	13	14	15
16	17	18 **Email** Questions? we're here for you	19	20	21 **Internal** Finalize all post OE comms	22
23	24	25	26	27 **Internal** Post-mortem, strategize for annual edu. plan	28	29
30						

Best Practices for Better OE Engagement

Open enrollment is about more than just sending information — it's about how people consume that information. And the truth is, most OE strategies are still stuck in the past.

Meet People Where They Are (Not Where You Wish They Were)

Employees don't wake up eager to dig through dense PDFs or log in to a portal. They're skimming emails between meetings, tapping through content on mobile, and texting their coworkers to make sense of confusing plan terms. If your OE strategy doesn't account for these habits, it's missing the mark. Your plan content should be accessible, intuitive, and digestible — wherever employees are and however they prefer to engage.

Multichannel > Single Channel

Print alone won't cut it. Email alone won't either. Today's most effective OE strategies blend print, email, SMS, QR codes, Slack, and even in-office signage to reinforce messaging. Why? Because people need to see things multiple times, in multiple formats, before it sticks. The key isn't doing more — it's choosing the right mix of high-frequency, low-friction channels that reinforce each other.

Personalization Isn't a Bonus — It's the Baseline

A one-size-fits-all guide doesn't reflect the diversity of your workforce. Employees care about the benefits that apply to their families, their budgets, and their situations. That's why personalized messaging — by location, role, or eligibility — helps reduce confusion, improve plan fit, and ultimately boost participation. The more an employee feels like the content was made for them, the more likely they are to take action.

Use Visuals to Reduce Cognitive Load

Let's face it — benefits are complex. The best OE strategies rely on visual aids to simplify dense content: plan comparison tables, decision trees, iconography, and callout boxes. It's not about making things pretty; it's about making them scannable and actionable.

Create a Theme People Can Remember

Too often, OE content is a jumbled mix of HR language and legal jargon. A strong campaign theme — one that's branded, consistent, and memorable — helps cut through the noise and creates a unified experience across all touchpoints. Whether it's a friendly slogan or a seasonal design, branding your OE campaign gives it structure and staying power.

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Ready to make OE easier for everyone?

If you've made it this far, you already care about improving the open enrollment experience. That's where Brite comes in.

Brite helps HR teams communicate benefits with clarity through mobile-first guides, decision support tools, and personalized messaging that employees actually use. We do the heavy lifting so you can focus on what matters: **supporting your people.**

Whether you're looking to optimize your existing strategy or try something new this year, we're here to help.

BOOK A DEMO