

Your Open Enrollment Toolkit Guide

Hello!

Welcome to your Open Enrollment Toolkit Guide, courtesy of your friends at Jellyvision.

Reaching your employees with the right messaging at the right time is always a challenge. Throw in the time constraints and year-long health and financial impacts your employees face during Open Enrollment, and that challenge can seem even more daunting.



That's why we created this Open Enrollment Toolkit. It's full of promotional materials, illustrations, and blurbs to send via email, text, Slack, Teams, or carrier pigeon. Whatever your preferred communication channel, these tools are designed to help you reach your eligible employees and get them talking to ALEX, learning about their benefits, and actively enrolling.

What's in this toolkit

So, what's in it for you? A lot, actually. When you downloaded this Toolkit, you received a smorgasbord of OE-themed support materials:

- Digital ads to promote Open Enrollment
- Blurbs, with and without the whimsy of ALEX
- Printable fliers and postcards
- Banners for your email signature
- Pre-made presentation slides
- Zoom backgrounds

If you need to re-download any of the materials, or if you're looking for more to



share with your employees, head to [ALEX Central](#). There, you'll find materials from years past, additional Toolkits for important initiatives, illustrations, blurbs, posters, fliers, and whatever else your heart desires — except for a miniature alpaca farm. We don't have that.

When and how to use

We've been in this business for a while now, and we've seen it all when it comes to promoting Open Enrollment. Here's our take on when and how to reach your employees with the materials provided in this Toolkit.



Adding your information

You may notice that some of the materials you've downloaded included a placeholder where you can add your own QR code to transport users to your ALEX instance.

How you decided to generate the QR code itself is up to you. There are many free online tools you can use, including as [Flowcode](#), [QR Code Monkey](#), or the aptly-named [QR Code Generator](#). Check with your internal team as your company may prefer or pay for a specific QR code generator.

Once you have your QR code, simply drop the image over the QR code placeholder box on the material you have open, adjust the size if needed, and boom! Your employees can access ALEX with a simple scan of their mobile device's camera.

You should also type your ALEX URL under the QR code — the same address linked to your QR code — in case someone wants to type the address into their internet browser.

Feel free to add your company's logo to the page, too!

Timing

We recommend starting your OE communication planning before — or shortly after — your plan details are finalized, especially if any of the following is true:

- You have a new carrier.
- There are changes to your plans, like premiums, in- or out-of-network providers, drug coverage, or copays.
- You've rolled out a new Benefits Administration or HRIS platform — or a nifty new tool called ALEX.

- You have a large population of employees selecting benefits for the first time, such as folks under 26 years old who are leaving their parent's plans.
- Your organization wants to see a jump in active enrollments.
- Your organization is having an active enrollment year.

Give yourself and your employees ample time to absorb these updates by communicating that Open Enrollment is approaching and that changes to their benefits may be coming.

Here's a sample calendar to help you plan your communication strategy:

8-12 WEEKS OUT	4 WEEKS OUT	2 WEEKS OUT
<ul style="list-style-type: none"> • Update your benefits guide • Determine your launch plan tactics and channels 	<ul style="list-style-type: none"> • Start internal promotion of Open Enrollment! • Download resources from ALEX Central • Plan all-company meeting or record async session 	<ul style="list-style-type: none"> • Print and distribute physical promo (postcards, fliers, etc.) • Send Open Enrollment detail emails



That's all easier said than done, though. Especially when your employees may be fully remote, work from different locations, deskless, or have different preferred communication styles. Not to worry — we can help you prepare for these scenarios.

Digital promotion

If your employee base is best reached via email, a messaging tool like Slack or Teams, or even text message, digital promotion is the way to go.

Digital ads, email banners, Zoom backgrounds, presentation slides, and even printable postcards and fliers can be sent via any digital channel. We suggest a mix of:

- Emails to employees
- Posts on company intranet pages
- Posts in messaging tools, like Slack or Teams
- Inclusion in your Benefits Administration tool or other HR tool portals
- Employee social media groups
- Company meetings or presentations, including live sessions or pre-recorded sessions
- Wherever else you already reach your employees with important company updates



In-person promotion

We have print-ready materials for you and your team to distribute. Use these to communicate with your employees through site-specific communications, like fliers in break rooms, postcards in mailboxes, or printed materials posted at job sites.

Keep in mind that printing and distributing materials takes time, so start thinking about where, when, and how you'll distribute OE promotional materials a couple of weeks in advance.

A mix of digital and in-person promotion

It's often said that a person needs to see a message seven times before taking action. So, if you have the opportunity to reach your employees with both print and digital communications this OE season — go for it.

If you need more help...

Let your Jellyvision support crew know if you need help downloading or editing materials. We're here to help you have a seamless Open Enrollment rollout.



Tips from Jellyvision

- Send a 15- or 30-minute calendar invitation to your organization titled “Take time to talk to ALEX”, scheduled during your Open Enrollment period. Include your ALEX link in the invitation. A simple reminder on their calendar may be the best way to reach busy individuals!
- Ask managers or other leaders to share a message directly with their teams. Have them send a link to talk to ALEX via email or messaging tool, share a reminder to talk to ALEX in a stand-up meeting, or ask them to post a physical flier in workspaces. Sometimes hearing a message from someone closer to their everyday work can make the difference.
- Incentives or contests can be a fun way to increase ALEX utilization. Ask your employees to take a screenshot of the last page of ALEX and send to your team for their chance to win a prize or enter a raffle!

A quick reminder

The Medicare Annual Enrollment Period (AEP) might overlap with your Open Enrollment timeline. Visit [ALEX Central](#) to download our ALEX Medicare Toolkit to ensure your Medicare-eligible employees, and employees with eligible loved ones, have the resources they need to enroll.

