



Open Enrollment Communication

Debrief Worksheet

Open enrollment is complete—almost. There’s one final step: **debriefing what worked and what could have gone better**. It may sound overwhelming, but this process is essential to ensuring ongoing success for the next year.



Debrief #1: Evaluate with Your Team

As a first step, gather your team (internal and external) and go through the questions below. The answers to these questions will help you considerably in planning next year’s open enrollment, so keep them on file!

Did you achieve your open enrollment goals? If not, why?

What went well during open enrollment?



What was frustrating?

What changes would you make to the planning process for next year? Is there anything that could be done different to make the process smoother?

What changes would you make with communications specifically? What channels of communication did employees engage the most with?

What can you do to build upon your successes and keep any best practices going?

What feedback did you receive from employees?

Are there pain points with employees that still need addressed? If so, can they be addressed before the next open enrollment?



Debrief #2: Gather Employee Feedback

Consider formally or informally gathering feedback from employees, too. A short (10-question) employee survey is a great way to assess the process and communications around open enrollment. Ask employees what was helpful during open enrollment and what sort of communications would be beneficial the rest of the year after they've made their benefit choices.

An Employee Benefits Survey Shows Employees You Care
(And Can Benefit Your Company, Too)

Read about it on our blog



Debrief #3: Analyze Your Data

Review your internal data to evaluate the best communications methods: email, intranet, home mailings, meetings/webinars, etc. Gathering this info is useful not only for developing your communications strategy but also budgeting for it.

12 Ways to Gauge Your Benefit Communications

Read about it on our blog



Preparation for Next Year

You'll be glad you put in the work around this last phase of open enrollment. The information gathered during this phase will provide a great foundation for year-round benefit communications strategy. Even more, you'll feel prepared to tackle next year's open enrollment with fresh eyes, new ideas and proven practices that work.