



LOS ANGELES CHAPTER

IN PARTNERSHIP WITH



# Best Practices for Open Enrollment



# Meet Your Presenter



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OneDigital West | Southern California



- Ranked 30th in large company category
- Only insurance brokerage & retirement plan advisory firm to make this year's list



185+  
Offices Nationwide



3,500+  
Employees



100,000+  
Clients Nationwide



\$80+ Billion  
Assets under Management



6,000,000+  
Individuals Served



23 Years  
Strategic Expansion

# Meet Helen @Burnham Benefits



Helen Vits  
VP, Sr. Consultant  
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949.933.5629



100+  
Office Locations  
Nationwide

4,000+  
Colleagues  
Nationwide

1.2+ mil  
Clients  
Nationwide

16%  
Annual Organic  
Client Growth Rate

#3  
Fastest Growing  
Broker by *Business  
Insurance*

# Generational Preferences

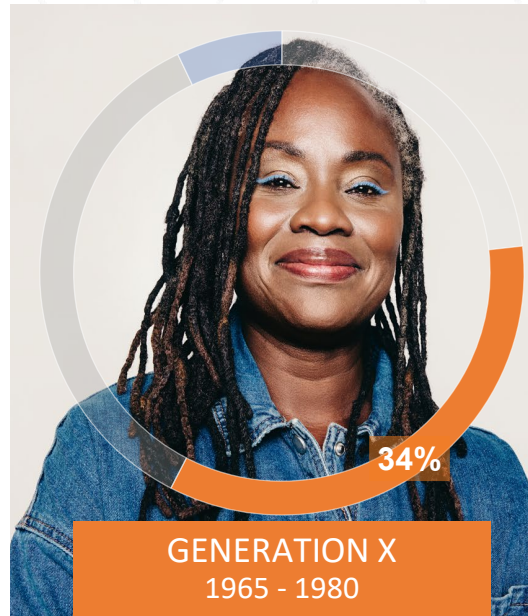


**BABY BOOMERS**  
1946 – 1964

*Hand me the information  
and walk me through it.*



RETIREMENT & HEALTH

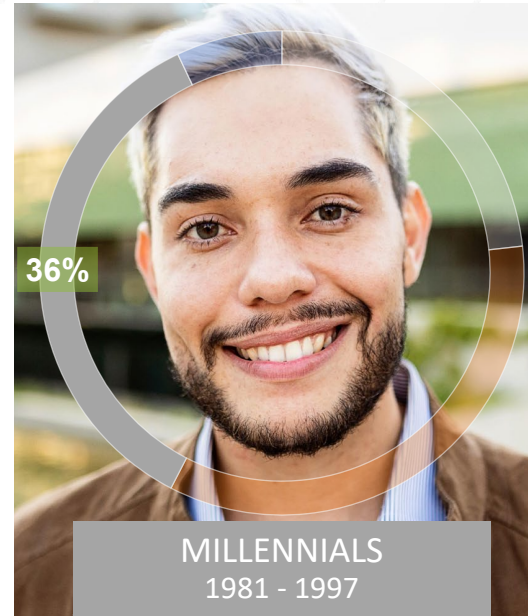


**GENERATION X**  
1965 - 1980

*Succinct. Get to the Point.*



FAMILY & FINANCES

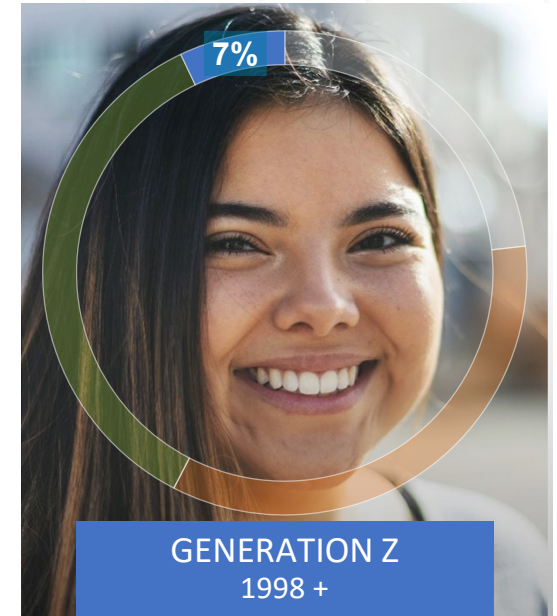


**MILLENNIALS**  
1981 - 1997

*Bite-sized*



FINANCIAL FREEDOM



**GENERATION Z**  
1998 +

*Self-directed*



SET UP FOR SUCCESS



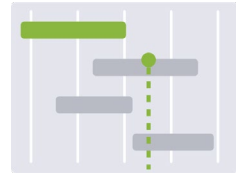
1% of employees in the “Greatest/Silent Generation” born before 1945

# Employee Engagement & Communication



## Assess

Analyze your workforce to develop a multi-channel communications plan



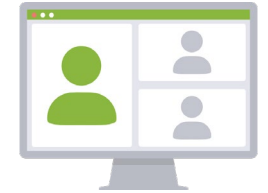
## Strategize & Planning

Build communications for benefits, open enrollment, and employee education



## Benefits Utilization

Deploy engagement & technology solutions to increase program understanding & utilization



## Member Engagement

Equip workforce with meaningful resources to stay productive, healthy, and engaged



## Open Enrollment

[Digital Presentations](#)

[Digital Benefits Guide](#)

[Digital Postcards](#)

[Benefits Portal](#)



## Year-Round Education

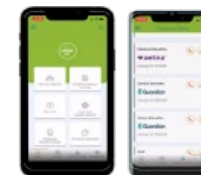
[Custom Animated Videos](#)

[Benefits Snacks Series](#)

[Podcasts](#)

[Brainshark Series](#)

## Custom Mobile App

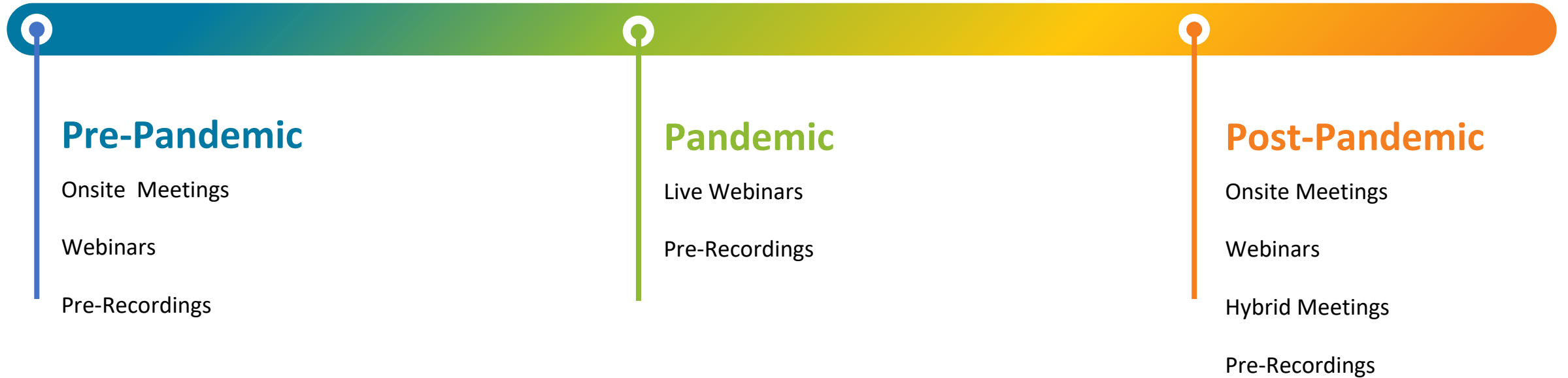


## Decision Support Tools



# Trend for Open Enrollment Meetings

OneDigital SoCal Mid-Market Groups



# 2023 Meeting Type Breakdown OneDigital SoCal Mid-Market Groups



**Webinar**

**41%**



**In-Person**

**59%**

# Open Enrollment Best Practices

Diversify  
Communication

Tailor Message

Avoid Jargon

Humor

Active or  
Passive

Healthcare  
Examples

Educate





*Ideal*  
**Open Enrollment  
Experience**

# International Society of Certified Employee Benefit Specialists

LOS ANGELES CHAPTER

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Visit our Open Enrollment website  
& check out our 2023 Checklist!

Brenda Demonte, CEBS | 949-328-3041 | [bdemonte@onedigital.com](mailto:bdemonte@onedigital.com)



# OE Communication Strategy & Email Marketing Tips



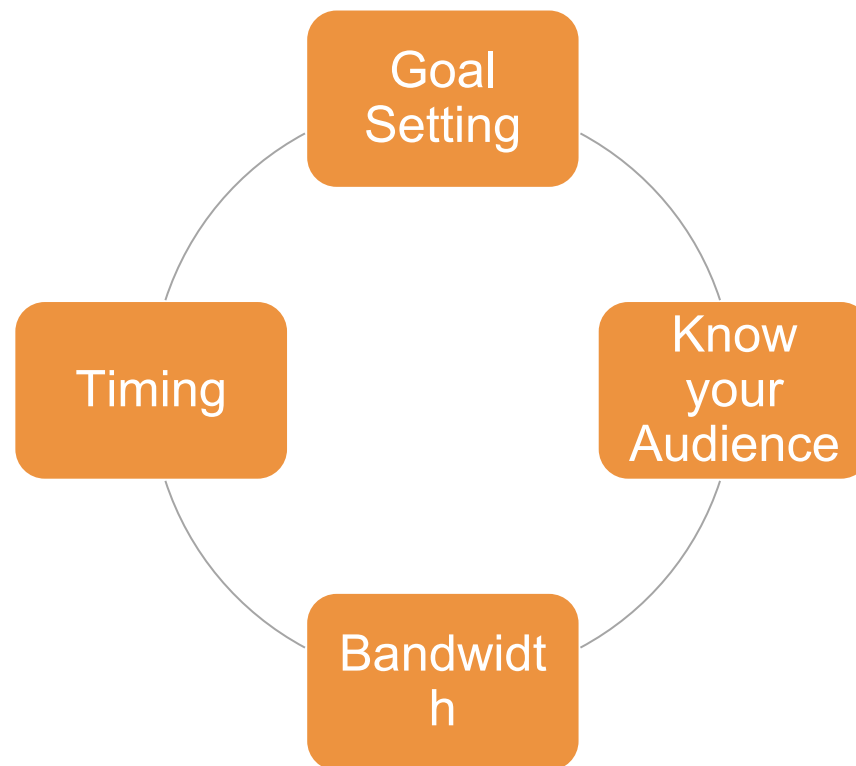
# What's the purpose of Open Enrollment?

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**Compliance:** Open Enrollment is the one time annual period employees can enroll, make changes, etc.

**Success is measured differently depending on the client, goals, and needs of organization.**

Manage Expectations



# 8 Tips for Effective 2023 Open Enrollment Communication (1 of 2)

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1

## START EARLY

- Communicate benefits early for employee understanding and planning.
- Repetitive messaging increases comprehension and engagement.

2

## DEVELOP KEY MESSAGING

- Plan communication strategies, focus on new benefits, and create FAQs for quick addressing of common concerns.

3

## SELECT APPROPRIATE CHANNELS

- Use a mix of digital and traditional methods to reach and engage employees, considering their preferences and workplace dynamics.

4

## KEEP IT SIMPLE

- Simplify benefits information, highlighting what's essential for decision-making.
- Provide additional resources for in-depth exploration.

# 8 Tips for Effective 2023 Open Enrollment Communication (2 of 2)

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5

## **PERSONALIZE COMMUNICATION**

- Tailor messaging for different employee segments, considering remote, on-site, and nonwired employees' needs and preferences.

6

## **AVOID JARGON**

- Simplify benefits by avoiding HR and benefits-related jargon.
- Decode acronyms and explain terms to improve comprehension

7

## **USE REAL-WORLD EXAMPLES**

- Relate benefits to practical scenarios to enhance understanding and emphasize the importance of coverage.

8

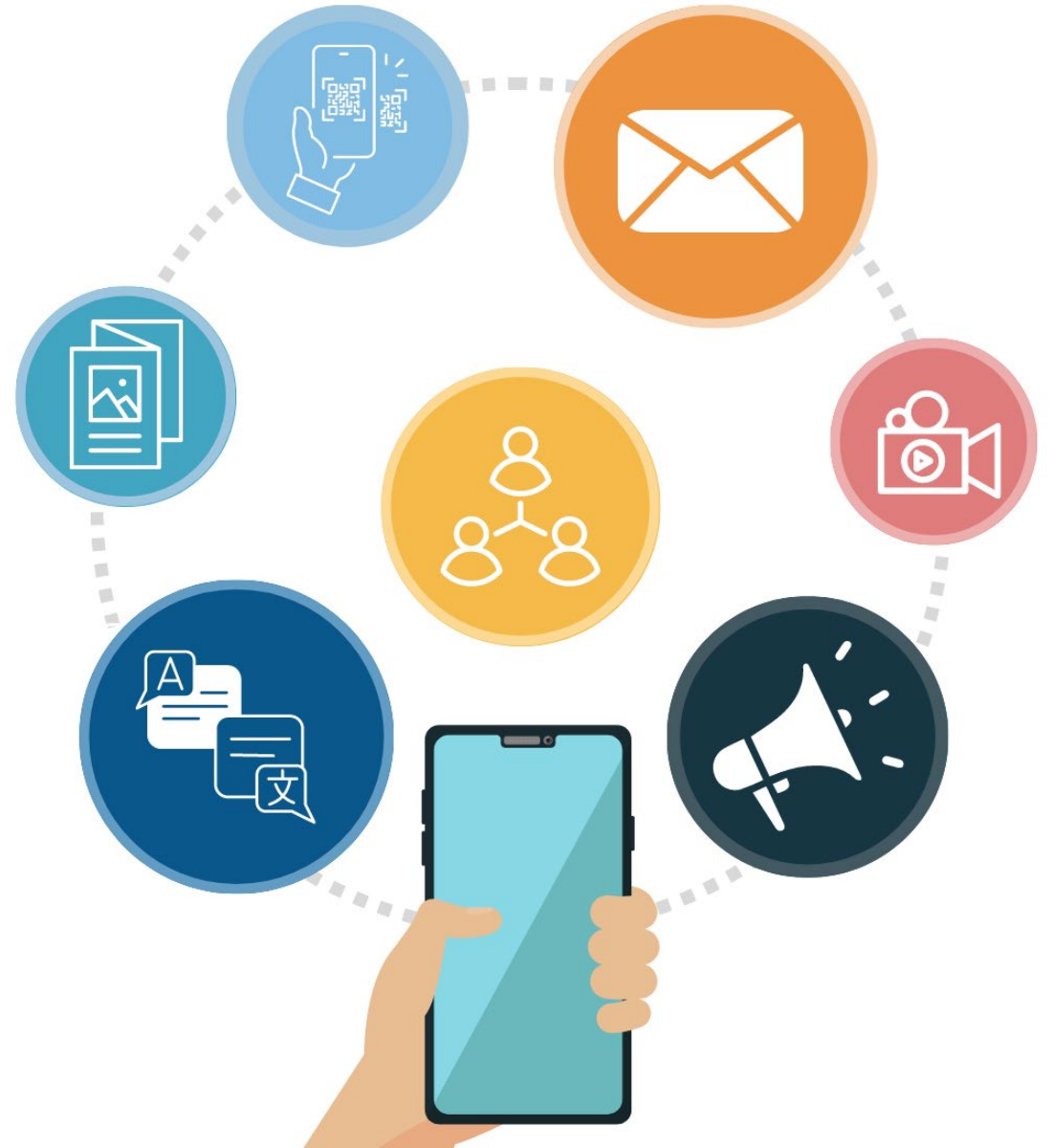
## **MAKE IT DIGESTIBLE**

- Present key messages immediately to maintain employee interest.
- Use bite-sized formats like videos and emails to avoid overwhelming employees.

# Effective Multi-Media Approach

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- Short recordings
- Trainings/webinars
- Print: flyers & posters
- Email reminders
- Utilizing embedded links
- QR codes to links for webpages and videos
- Health fairs
- Different languages as needed



# Best Times to Send Emails

## BEST DAY OF THE WEEK TO SEND EMAILS



Thursday #1



Tuesday #2



Wednesday #3

## TIMINGS THAT WON'T WORK



Weekends



Mondays



Nighttime

## TOP PERFORMING TIME



**8 AM**

For Email  
Open Rates



**10 AM**

For Engagement  
Rates



**5 PM**

For Click-  
Through Rates



**1 PM**

For the Best  
Results



Reference 2023 World Data  
Email Marketing Calendar for  
specific performance dates.





# Subject Lines: Creating a Positive Email First Impression

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- Create an actionable subject line
- Test your subject line for effectiveness
- Provide additional context in the preview text
- Use clear and simple language that is reader-friendly
- Highlight the value of your email from the start
- Ensure the sender name is clear, as emails tend to perform better when sent from an actual person's email address
- Personalize subject lines by including the recipient's name.



Test subject line through  
[www.subjectline.com](http://www.subjectline.com)



# Top Email Tips: Copy, Design & Layout

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1. Use 14px+ font for body text and 22px+ font for titles
2. Keep paragraphs under five lines
3. Left-align paragraphs over three lines
4. Try bulleted lists for easy skimming
5. Use powerful language that encourages action
6. Use 1.5-2 lining spacing
7. Test email and make sure fonts and format display properly
8. Design for desktop but make sure it's also mobile compatible
9. Use plenty of white space around headers, subheaders, images, and text
10. Experiment and see what kind of content performs best with your audience
11. Don't forget: Include unsubscribe link and URL to visit your brand online and/or social channels



Need inspiration? Visit  
[www.reallygoodemails.com](http://www.reallygoodemails.com)





## Upcoming Events

- LA Healthcare & Retirement Plan Summit – August 17  
Los Angeles, CA
- Education Session – November  
Virtual
- Happy Hour – December  
Location TBD

## Register

[cebslosangeles.com](http://cebslosangeles.com)

A large, semi-transparent collage of diverse people's faces, including men and women of various ethnicities and ages, arranged in a grid-like pattern. The collage is overlaid with a blue-to-green gradient.

Thank you  
for joining