

How to hold a successful virtual OE experience

How to guide



Open enrollment is one of the busiest times of the year for Human Resources professionals.

From navigating updated pricing with medical, dental and vision providers to compiling benefits information to figuring out how to make sure employees understand their benefit options.

「 Sounds easy, right? 」

That's why we've put together this how-to guide to help you hold a successful virtual open enrollment experience.

This guide will help you effectively communicate benefits information to your employees and give you some ready-to-use open enrollment materials.

1. Keep It Short and Simple

The average person's attention span is 8 seconds. Just think: How long did it take you to read this paragraph?

Information must:



Be easy to scan. Use short, bold headlines to draw attention.



Use bulleted lists, which work best in groups of 3 or 5.



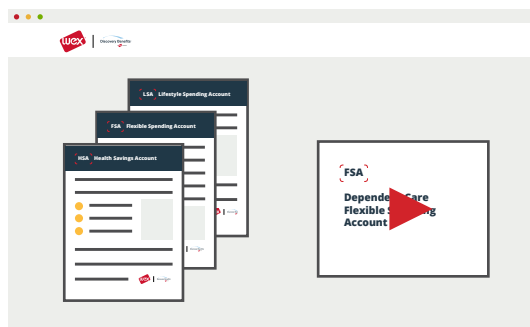
Explain plan benefits by comparing them to everyday examples.

2. Make it Convenient

People like having time to review information when it is convenient for them. Publish your benefits information to an intranet site so it can be accessed 24/7. Provide the information in a variety of different ways, such as PDFs that can be downloaded or printed, short videos or demos, and provide contact information if they have additional questions. If possible, build a page dedicated solely to your benefits information.

Check out our [Open Enrollment Toolkit](#)

to download PDFs of employee handouts, promotional and educational videos.



3. Communicate Early

Start communicating your open enrollment deadlines and benefit plan information 2 to 3 months in advance. The month before your open enrollment, send out weekly emails that link to handouts and videos with a strong call to action to help ensure employees don't miss important deadlines.

Our [email templates](#), available on the OE toolkit, make it easy for you to encourage participation in flexible spending accounts (FSAs), dependent care FSAs, health savings accounts (HSAs) and commuter benefits.



Or let us do it for you.

Provide us with a list of all of your benefits-eligible employees, and we will send out emails on your behalf. Check out our [automated email campaign options here](#).



4. Make it a Virtual Fair

The number of online shoppers in the U.S. is expected to reach 300 million by 2023.¹ That's 91% of the entire U.S. population! This has led to heightened focus on the online shopping experience, including how people get and receive information.

WEX offers a virtual open enrollment fair that you can host for your employees. This interactive site allows employees to interact with our virtual benefits booth, watch videos, download handouts and even chat with a live agent.

For more information about our virtual OE fair, visit our [Open Enrollment Toolkit](#).

5. Remind Employees of Online and App Access

The best way for an employee to get the most out of their benefits is to [log in](#) or download our [mobile app](#). They can view hundreds of how-to articles and micro-videos right from their online account by clicking "Get Help."

You can introduce employees to their online account tools and resources by participating in our [Kickstart Mailer](#). For a nominal fee, we will send education about their online accounts to newly enrolled employees via direct mail.

For more information on how to build an effective open enrollment communication plan check out our [blog post](#).

Don't forget to take this one step further.

Once open enrollment is over, don't stop communicating. Make benefits education an ongoing part of your HR communications strategy. The "Rule of 7" suggests someone needs to hear a message seven times before they will remember it and consider taking action. By keeping employee benefits on their minds throughout the year, you're building habits that will hopefully boost participation in future plan years, which helps you and your employees save more money.

¹<https://optimmonster.com/online-shopping-statistics/>