

The Ultimate Open Enrollment Checklist for People Leaders

We've created this checklist to help you plan, optimize and execute a benefits season that works for everyone. From strategic planning and vendor partnerships to creating genuine employee engagement throughout the process, this guide goes beyond the basics.

✔ 8–12 Weeks Before Open Enrollment

OBJECTIVE: STRATEGIC PLANNING & PEOPLE-FIRST PREPARATION

- Review your benefits strategy to ensure it reflects your values, meets diverse needs, and fits your budget.
- Gather employee input to guide plan design and vendor decisions.
- Evaluate your contribution strategy to balance accessibility and sustainability.
- Explore options with current and potential partners to find better value.
- Use data (benchmarks, claims, utilization) to negotiate with carriers.
- Review plan design—deductibles, copays, coverage, and voluntary benefits—to ensure they are competitive and valuable.
- Model cost scenarios to understand the impact on the company and employees.
- Assess current vendor service, claims support, and employee satisfaction.
- Finalize your open enrollment timeline and align internal teams.
- Build a multi-channel communications plan tailored to different audiences.
- Create a detailed roadmap with milestones for approvals, communications, training, and system prep.

✔ 4–7 Weeks Before Open Enrollment

OBJECTIVE: COMMUNICATION & SYSTEM READINESS

- Finalize plan documents, rates, and summaries for accuracy and compliance.
- Create clear resources (FAQs, guides, comparison tools, decision support) that guide educated, informed benefit selections.
- Plan engaging educational sessions (webinars, meetings, consultations) to explain benefits.
- Test enrollment systems, including mobile access and payroll/HR platform integrations.
- Equip HR and support teams with knowledge and tools to confidently assist employees.

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✓ 1–2 Weeks Before Open Enrollment

OBJECTIVE: FINAL PREPARATIONS & TEAM ENGAGEMENT

- Send friendly countdown reminders that clearly communicate deadlines and what employees need to do.
- Offer open office hours for employees to get real-time answers and clarity on any changes or confusing details.
- Monitor systems closely to ensure everything is running smoothly.
- Create and communicate clear plans for technical hiccups, high volumes of questions, or unexpected challenges.

✓ During Open Enrollment

OBJECTIVE: EXECUTION & ONGOING SUPPORT

- Keep teams informed about deadlines, current coverages, plan and rate changes, and how to reach carriers.
- Support leaders with talking points and clear direction on how to help people while directing detailed questions to HR.
- Maintain consistent, helpful communication with regular deadline reminders, including those crucial final-day alerts.
- Track who's participating and contact team members who might need a gentle reminder or extra support.
- Provide responsive, real-time help through accessible support channels.
- Acknowledge and celebrate your teams' engagement throughout the process.

✓ After Open Enrollment

OBJECTIVE: FOLLOW-UP & CONTINUOUS IMPROVEMENT

- Carefully review enrollment information for completeness and accuracy before submitting final elections to carriers.
- Communicate with carriers to ensure smooth processing and timely delivery of ID cards to your team.
- Double-check that payroll deductions and benefit elections are accurate across systems, resolving discrepancies quickly.
- Confirm compliance with healthcare regulations and other requirements to protect your organization and employees.
- Be available to answer remaining questions and provide clarity on benefit choices.
- Update internal systems to reflect new elections and ensure seamless integration with payroll and HR platforms.
- Schedule a thoughtful debrief—celebrate what went well, identify opportunities for improvement, and capture insights for next year.
- Share meaningful participation data, cost insights, and strategic takeaways with leadership to inform future decisions.
- Explore mid-year opportunities for voluntary benefits, retirement planning, or wellness programs that could address unmet needs and boost engagement.
- Leverage employee feedback through surveys or conversations to guide future benefits planning and communication.

Let's Tackle Your Challenges Together

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Namely | 855.626.3591 | sales@namely.com

