THE ENTERPRISE TEAM — KNOWLEDGE CENTER

Open Enrollment Toolkit

A practical checklist and communication plan to run a smooth open enrollment period.

8–10 weeks out

- Finalize plan designs, rates, and contribution strategy.
- Confirm carrier and vendor readiness.
- Build the enrollment timeline and owner list.

4–6 weeks out

- Prepare employee-facing benefit guides and summaries.
- Schedule information sessions (in-person and virtual).
- Test the enrollment system end-to-end.

Enrollment window

- Send a clear kickoff announcement with deadlines.
- Offer multiple support channels for questions.
- Send reminders at the midpoint and 48 hours before close.

After close

- Reconcile elections with payroll and carriers.
- Confirm ID cards and coverage effective dates.
- Capture lessons learned for next year.

Communication tips

- Lead with what changed and why it matters to employees.
- Use plain language — avoid jargon and acronyms.
- Reinforce the value of the total rewards package.

Questions about how this applies to your organization? Our advisors offer a free consultation — visit the contact page on our website.

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