

The second step of enrollment readiness: Preparing for open enrollment



So your clients are now set with [the benefits plan you created together](#). They're excited — and they're probably asking what they need to do now. And you have the answer: It's time to dig in and prepare for the enrollment period.

Here are four steps that will help edge them toward complete enrollment readiness.

Four ways to help your clients prepare for open enrollment

1. Share carrier options and make decisions.

Even if your clients have been using the same carriers for years, it never hurts to explore the market now that they know what types of products they plan to offer. When you share the most current information on products, capabilities and pricing, your clients will be more confident they're making informed decisions about the carriers that are going to help them bring their benefits strategy to life.

2. Consider ways to streamline.

You likely had a tech needs discussion with clients during the earliest enrollment planning stage, and now is the time for them to move forward with a platform partner if they're going that route. Benefits administration platforms allow for a quicker process for both those enrolling and those processing the enrollments, saving your clients and their employees their greatest asset — time. And there are numerous options with ranging functionality and price points to ensure your clients get the best fit.

3. Create a communication and education plan.

Everyone wins when employees understand what's available to them via their benefits program. In fact, there's a direct correlation between benefits literacy and benefits satisfaction. With only 43% of employees feeling confident they understand everything about their insurance policies,¹ you want to be sure they understand the benefits your clients offer — and how they can help them.

The best place to start is a multi-touch benefits communication and education plan that engages employees before, during and after enrollment. There are endless options — traditional print collateral like product brochures and flyers, one-on-one counseling sessions, the latest digital communication methods — that can boost awareness, participation and understanding. And as you're helping to create a unique plan for each client, you're building a comprehensive library from which to choose and scale to accommodate your entire book of business.



It's also worth your clients to consider a more structured approach to benefits training this year — based both on the changes and shifts that have occurred over the last few years and also because of the range of generational differences in the workforce. Group meetings, webinars and podcasts are all great ways to share information with employees using methods that match the ways they like to receive information.

4. Start early.

You know that it's always better to be overprepared than underprepared. And the surest way for your clients to avoid the latter is to start early. Doing so will allow them to handle lapses in internal and external communication, unexpected tech issues and other unforeseen challenges at a more logical pace. With time — and a trusted partner — on their side, sudden roadblocks won't seem as daunting to overcome.

¹ Aflac. "Aflac WorkForces Report: Workplace Benefits Trends Executive Summary." Published November 2022. [Accessed 6.2.2022](#).

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