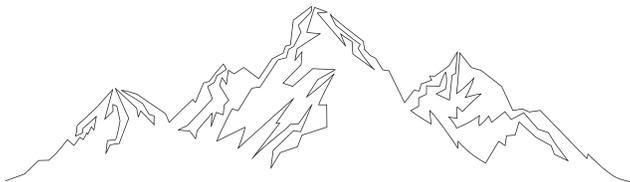# bswift®

Conquer Annual Enrollment:

7 Steps to Scale Your HR Everest

Ready to tackle annual enrollment? Use this checklist to ensure your benefits package is top-notch and that your employees clearly see the value in it. Let's get started.

1. Strategic Planning and Data Analysis: Survey Your Starting Point

Focus: Gathering insights and setting the stage for a successful enrollment.

- ☐ Review the previous year's enrollment data and identify trends
- ☐ Analyze workforce demographics and benefits utilization patterns
- ☐ Assess the impact of any recent or upcoming policy changes
- ☐ Determine your key performance indicators for measuring success

Quick Tip: Start by understanding the landscape. Your data and employee feedback are your topographical map, guiding you to align your benefits strategy with both workforce needs and organizational goals.

2. Customer Service Excellence:
Support Employees Every Step of the Way

Focus: Ensure your workforce gets top-tier, values-aligned support throughout the benefits journey.

- ☐ Stay informed about updates to customer service processes
- ☐ Leverage [Mindful AI](#) solutions to enhance benefits enrollment and customer service
- ☐ Equip your customer service with company-specific benefits information
- ☐ Educate employees on all available benefits support channels

Quick Tip: Think of your customer service team as expert guides. With the right tools and training, they lead your employees through the enrollment process, providing clear, compassionate support.needs and organizational goals.

3. HR Technology Preparedness:
Test and Optimize Your Tools

Focus: Verify your HR technology is ready to support a smooth enrollment process.

- ☐ Evaluate your enrollment platform's functionality, features, and ease-of-use
- ☐ Verify the system can handle the anticipated volume and peak times
- ☐ Ensure mobile accessibility for employees across various locations
- ☐ Confirm all new benefits options are correctly integrated into the system

Quick Tip: Your HR tech stack is like your climbing gear. [Robust, user-friendly HR tech](#) is essential for a smooth and successful enrollment.
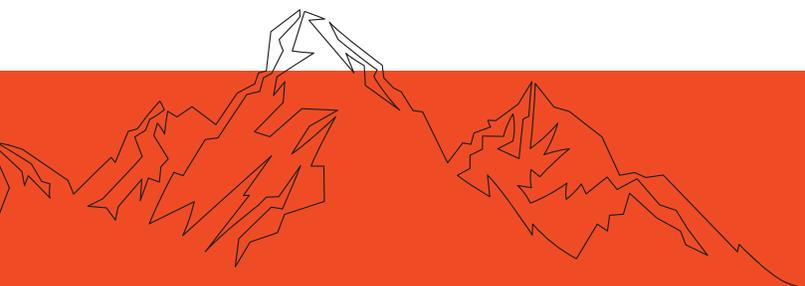
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4. Compliance and Legal Review: Secure Your Ascent

Focus: Ensure compliance with regulations and minimize legal risks.

- ☐ Review all materials for compliance with current regulations
- ☐ Verify that benefit plans meet all legal requirements, including ACA provisions
- ☐ Maintain detailed and organized records for audits and future reference
- ☐ Consult with the legal team on any areas of uncertainty
- ☐ Keep ahead of regulatory changes that may impact benefits or enrollment

Quick Tip: Compliance is your safety gear—essential for avoiding legal risks and ensuring a secure enrollment process.

5. Communication and Education Strategy: Guide Employees to the Summit

Focus: Develop and implement effective communication to engage and educate employees.

- ☐ Develop a multi-channel communication plan (texts, emails, videos, virtual benefits fairs, etc.)
- ☐ Craft clear, concise messaging about plan changes and the enrollment process
- ☐ Create educational materials that explain the value of various benefit options
- ☐ Ensure employees can get help for their toughest questions by phone or chat

Quick Tip: Effective communication is key to acclimating your team to new benefits. Clear, consistent messaging now means fewer questions later.
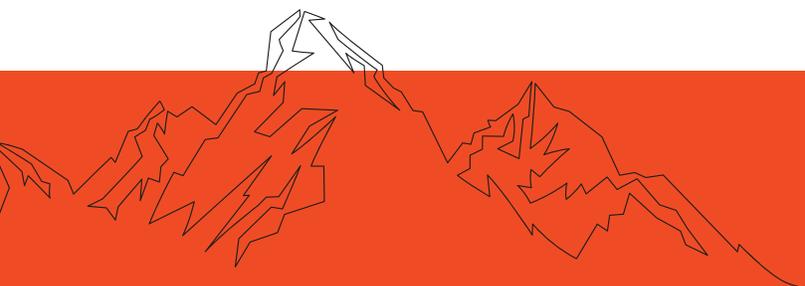
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6. Budget Management:
Optimize Your Resources

Focus: Controlling costs and maximizing the return on investment for benefits programs.

☐ Analyze current healthcare costs and project future expenses

☐ Explore cost-saving measures without compromising benefit quality

☐ Prepare budget reports for leadership, highlighting ROI of benefit programs

Quick Tip: Like any well-planned expedition, make every resource count. Focus on efficiency to maximize the impact of your benefits program.

7. Post-Enrollment Analysis:
Reflect and Plan for the Future

Focus: Assessing your enrollment outcomes and looking for areas to improve next year.

☐ Set up systems to capture real-time enrollment data and analytics

☐ Plan for a comprehensive post-AE review with key stakeholders

☐ Prepare report on enrollment outcomes, cost implications, and future recommendations

Quick Tip: After the climb, it's time to reflect. Analyze your results and start planning for next year's enrollment, using this year's insights to make improvements.
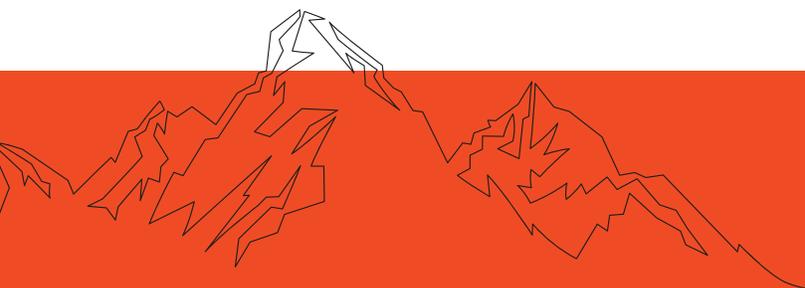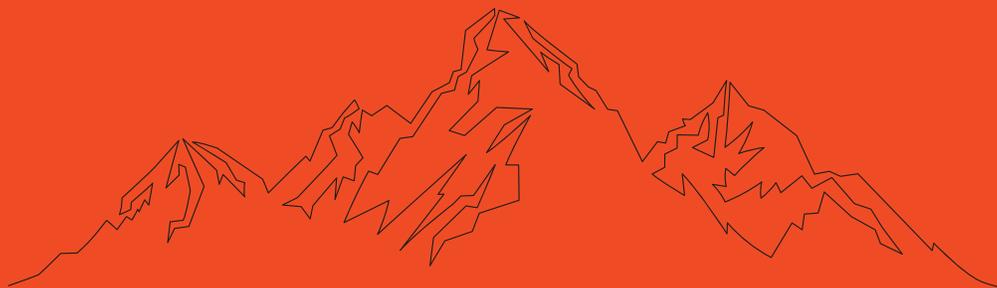
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Annual Enrollment is Easy with the Right Partner

Ready to take the next step? Connect with bswift® to ensure a successful annual enrollment. Let's reach new heights together—hiking boots optional.

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