

Use this checklist to evaluate whether your organization's benefits communication approach helps employees clearly understand their options, make informed decisions, and complete enrollment with confidence.

Employee benefits are one of the most important and complex areas of workplace communication. Employees often need to understand multiple plan options, coverage details, costs, and enrollment deadlines within a short period of time.

A structured communication strategy helps employees understand what benefits are available, how those benefits work, and what actions they need to take. This checklist helps employers review whether their benefits communication process is clear, coordinated, and supportive of employee decision-making.



1. Define the Communication Objective

- The purpose of the communication is clearly defined

Example: "This message explains the new medical plan options and what employees need to do during open enrollment."

- The message explains why the information matters to employees
- Required employee actions are clearly identified
- Enrollment deadlines or key dates are clearly stated
- Employees understand what decisions they need to make



2. Identify the Right Employee Audience

- The communication clearly identifies which employees the message applies to

Example: "This update applies to all full-time employees eligible for the company medical plan."

- Communications are tailored to the correct employee groups
- Managers receive guidance if employees are likely to ask questions
- Remote or field employees can easily access benefits information
- The communication method fits how employees typically receive information



3. Make Benefits Information Easy to Understand

- Plan options are explained in simple, plain language

Example: “Plan A has a lower monthly premium but a higher deductible. Plan B has a higher premium but lower out-of-pocket costs when you receive care.”

- Benefits descriptions avoid technical or insurance terminology when possible
- Differences between plan options are easy to compare
- Costs, deductibles, and employee contributions are clearly explained
- Materials help employees understand when each option may be appropriate.



4. Use Multiple Communication Channels

- Important benefits updates are communicated through more than one channel

Example: Employees receive an open enrollment email, an enrollment guide, and access to a recorded benefits overview meeting.

- Employees receive written materials they can review later
- Meetings, webinars, or recorded sessions support complex benefits topics
- Benefits information is easy to locate after enrollment
- Employees know where to go for reliable benefits information



5. Prepare for Questions and Employee Support

- Employees know exactly who to contact with benefits questions

Example: “For questions about plan options, contact HR at benefits@company.com or attend the scheduled Q&A session.”

- HR or benefits teams are prepared to answer common questions
- Managers have guidance if employees ask about benefits decisions
- Frequently asked questions are captured and addressed
- Additional communication is planned if confusion appears during enrollment



6. Review Whether the Communication Worked

- Employees completed enrollment decisions on time

Example: “95% of employees completed open enrollment before the deadline.”

- Common employee questions helped identify unclear areas
- Employees appeared confident in their benefits choices
- Communication reached the intended employee groups
- Lessons learned are documented to improve future communication

Quick Self-Assessment

After completing the checklist, review how many items you were able to confidently check.

Mostly Checked

Your organization likely has a well-structured benefits communication process. Continue reviewing materials each year to ensure information remains clear and easy for employees to understand.

Some Items Unchecked

There may be areas where employees are receiving incomplete or confusing benefits information. Review the sections where items were left unchecked to identify opportunities for improvement.

Many Items Unchecked

Your organization may benefit from developing a more structured benefits communication strategy. Improving clarity around plan options, enrollment guidance, and employee support can significantly improve employee understanding and decision-making.

What to Do Next

Step 1 — Identify where communication gaps exist

Review the sections where several items were left unchecked. These areas often indicate where employees may be experiencing confusion.

Step 2 — Identify the primary communication challenge

Common issues include:

- unclear explanations of plan options
- difficulty comparing benefits
- limited communication channels
- insufficient support during enrollment

Step 3 — Implement one improvement before the next enrollment cycle

Choose one improvement such as:

- adding a simple side-by-side plan comparison chart
- simplifying benefits descriptions using plain language
- hosting a short benefits overview meeting or webinar
- creating clearer employee support resources

Step 4 — Apply the improved approach during the next benefits communication cycle

Use this checklist before your next open enrollment, benefits announcement, or new-hire onboarding communication.

Step 5 — Build a repeatable communication process

Over time, develop a consistent benefits communication approach that employees can rely on each year.

Putting This Approach into Practice

Improving employee benefits communication rarely requires a complete redesign. In many cases, small adjustments — clearer explanations, better plan comparisons, or more accessible support — can significantly improve how employees understand their options.

By identifying common communication challenges and implementing one practical improvement in each enrollment cycle, organizations can gradually build a communication process that employees understand and trust.

The checklist above is designed to help plan sponsors take a structured first step.

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