



Mastering Open Enrollment

10 TIPS FOR CREATING MORE ENGAGING MEETINGS



Open Enrollment: Your Chance to Drive Real Engagement

Open enrollment is more than a required HR meeting. It's a critical opportunity to shape how employees engage with their benefits all year long. Done well, it can build trust, spark utilization and increase appreciation for a company's benefits package.

As a broker, your role is pivotal. You're not just delivering plan details. You're guiding your client's communication strategy, helping them highlight hidden value and setting the tone for how employees interact with their benefits.

Why It Matters

- High engagement during open enrollment leads to higher benefit utilization, which improves employee satisfaction and supports business outcomes.
- Educating employees in a way that's clear, relevant and approachable drives smarter decisions – and better use of available benefits.
- A well-run meeting builds connection and trust between employers and their employees, reinforcing the value of the entire benefits package.

In This Guide

You'll find 10 proven tips to help you plan and lead more effective open enrollment meetings – plus ways to leverage New Benefits tools and services to deliver a more impactful experience.

TIP 01

Set the Stage With Clear Goals

A successful open enrollment meeting starts with establishing clear goals – not just for what’s presented, but for how employees respond. Without defined objectives, meetings can become a one-way information dump instead of a strategic engagement opportunity.

Start with intent. Help your clients define what they want employees to take away. Are they trying to raise awareness about new benefits? Boost enrollment in underused options? Reduce confusion or HR follow-up?

Make it measurable. Encourage your clients to establish benchmarks they can track over time, such as increasing enrollment in specific non-insured benefits, decreasing common plan selection errors or driving more traffic to a member portal or mobile app.

Align content to goals. Once you have clear objectives, build the presentation around your client and their employees. Focus the agenda, trim the content and prioritize the messages that support what you’re trying to achieve.

Measure and refine. After the meeting, help clients review outcomes and identify areas for improvement. What worked? What didn’t? Use that insight to improve communication year after year.



+ Benefits Strategy Is Our Strong Suit

Looking for a strategic partner to guide your clients through benefits planning? New Benefits acts as an extension of your team. We'll help assess employee needs, set clear program goals and build a benefits package that includes the latest non-insured benefits that supplement traditional, insured plans.

TIP 02

Use a Theme to Tie It All Together

A clear theme gives your open enrollment meeting structure and energy. It signals to employees that the meeting is cohesive, intentional and worth their attention. A strong theme also helps simplify complex information by giving it a unifying message employees can relate to.

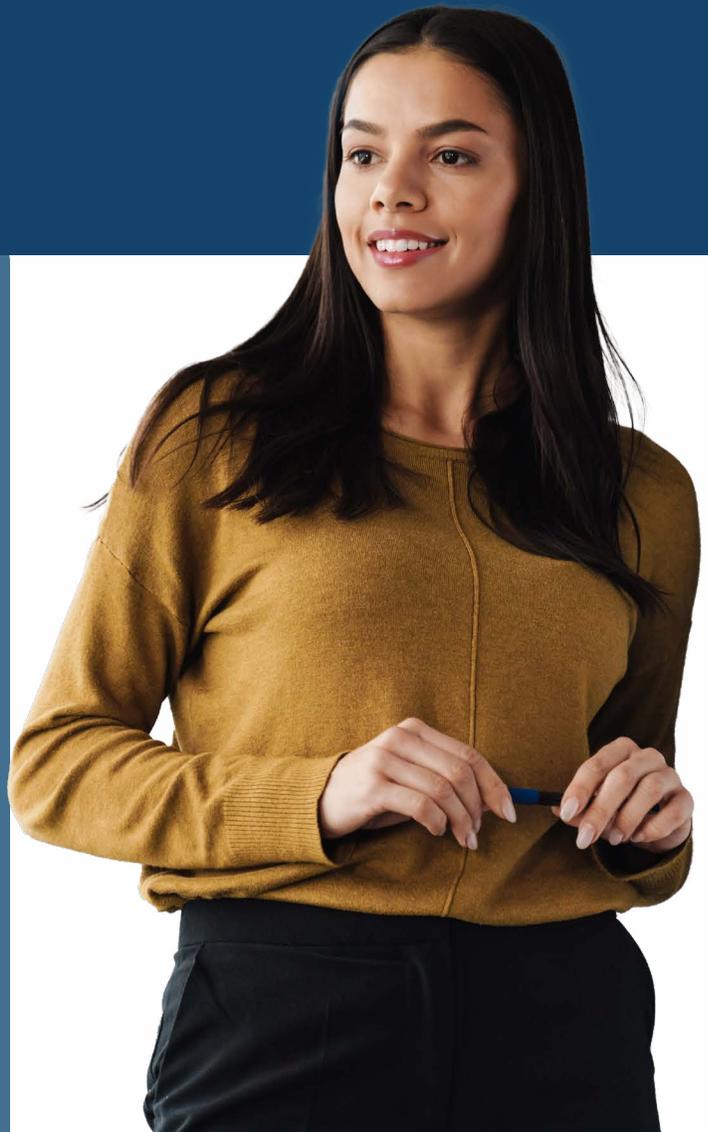
Start with a message. A theme gives your presentation a central idea to build around. Think in terms of employee outcomes or organizational values. Examples include:

- "Better Benefits, Better You.": *personal relevance*
- "Choose What Works for You": *empowerment and choice*
- "Invest in You": *financial wellness and growth*
- "Make the Most of What's Yours": *ownership and pride*

Use it consistently. Once you've selected a theme, apply it across all materials: invitations, agendas, slide titles, handouts and even videoconferencing backgrounds. A cohesive visual identity reinforces the message and makes content more memorable.

Connect it to action. Your theme should reflect what you want employees to do: enroll, engage, ask questions or explore options.

Refresh it annually. If your clients run similar meetings each year, suggest updating the theme to keep content fresh and relevant.



+ Need Help Driving Benefit Engagement?

Even the best benefits fall flat if employees don't understand them. That's where our Member Engagement Services come in. We work with brokers and employers to build custom communication strategies, branded materials and multichannel campaigns that educate and activate employees.

[Learn more.](#)

TIP03

Keep Presentations Short, Visual and Conversational

Employees lose interest quickly during open enrollment meetings, especially when the content is dense or overly technical. Help clients structure presentations that are focused, engaging and easy to follow. A streamlined approach not only improves comprehension, but also shows respect for employees' time and attention.

Be concise. Limit each benefit explanation to 2–3 minutes. Focus on what it is, why it matters and how to use it. Use a simple outline to guide presenters and avoid overload.

Make it visual. Use icons, infographics and plan comparisons to replace text-heavy slides. Visuals improve understanding and keep people's attention.

Keep it conversational. Encourage a clear, friendly tone. Ask questions, pause for input and avoid jargon. Use "why it matters" statements to connect benefits to real-life situations.

Support different learning styles. Combine spoken content with visuals and leave-behind summaries to help everyone retain the message.



+ In-Person Still Wins

According to the New Benefits Broker Pulse Survey, 57% of brokers say in-person meetings are still the most effective way to introduce non-insured benefits. Face-to-face sessions drive better engagement and follow-through, and allow for real-time questions, feedback and relationship-building that's hard to replicate virtually.

TIP 04

Lead With What's New

Employees are most alert at the beginning of a meeting, so use that time wisely. Start by highlighting what's new or changing in the benefits package to capture attention and establish relevance. Leading with fresh updates sets the tone for the rest of the session and helps employees quickly understand why this year's information matters to them.

Call out meaningful updates. Focus on changes that directly affect employees, such as new benefits added this year or shifts in plan structure, eligibility and costs. These updates help employees understand what's new, why it matters and how it can improve their daily lives.

Put it in real terms. Don't just list new offerings; explain how they help. Will this benefit help someone avoid out-of-pocket costs? Save time navigating healthcare? Get access to legal or caregiving support?

Avoid overwhelming detail. Keep this section high-level. Go deeper on new benefits later in the meeting or in supplemental materials.

Set the tone. When you lead with what's new and valuable, you show employees this meeting is worth their time – and their choices matter.



+ Highlight Non-Insured Benefits

Employees often expect open enrollment to focus solely on medical, dental and vision. Use this opportunity to spotlight the extras – non-insured benefits that address everyday challenges, such as identity theft protection, roadside assistance, tax support and pet insurance. The more employees understand the full value of their extended benefits, the more likely they are to use them.

TIP05

Use Interactive Tools to Drive Participation

Whether your meeting is in person or virtual, interactive tools turn passive attendees into engaged decision-makers. Interactive moments create a more dynamic experience that keeps employees focused and encourages them to ask questions, explore their options and connect benefits to their real-world needs.

Make it fun. Use live polls or quizzes to break the ice and reinforce key concepts. Ask questions like, “What benefit are you most likely to use this year?” or “Which option saves you the most time?”

Open the floor. Build in time for Q&A – either live or via chat – to clarify confusing topics or offer real-time support.

Create challenges. Try digital scavenger hunts through your portal or app, or offer small prizes for participation.

Encourage exploration. Include time for a quick walkthrough of the member portal or app so employees know where to find support when they need it.



+ Boost Engagement With the New Benefits App and Portal

The New Benefits mobile app and web portal give employees 24/7 access to digital ID cards, benefit details and educational resources – all on one convenient platform. Demo it live during your meeting to drive interest and encourage employees to explore their benefits on their own time. [Learn more.](#)

TIP06

Bring Benefits to Life With Real Stories

Stories stick. Data informs. But it's stories that connect with employees on a personal level. Use storytelling to help employees relate to benefits in ways that are meaningful and memorable. When someone hears how a coworker avoided a costly ER visit or got help navigating a legal issue, the benefit becomes real – not just another bullet point in a presentation.

Make it real. Share real (or realistic) scenarios that show how a benefit made a difference – financially or emotionally. Highlight the outcome in a way that encourages employees to picture themselves using the same resource.

Create a format. Structure each story with three quick parts: the problem, the benefit used and the outcome. Then add a short takeaway to reinforce value, such as, "This saved her hours of stress and hundreds of dollars."

Encourage conversations. Ask HR leaders or coworkers to share their own benefit stories during the meeting. When employees hear how someone like them used a benefit successfully, they're more likely to explore it themselves.

Repeat what matters. Use stories to reinforce key benefits throughout the presentation. Bring the narrative back during Q&A or in follow-up materials.



+ Speaking of Real-Life Stories...

After launching with New Benefits, Sally Beauty saw a 76% portal adoption rate and a 2.6x increase in benefit utilization. Their success came from combining clear storytelling, targeted communication and the right digital tools to engage employees at every level. It's a strong example of how thoughtful enrollment strategies can lead to real, measurable outcomes.

[Explore the case study.](#)

TIP 07

Offer Take-Home Materials That Reinforce the Message

Not everything sticks in one sitting, especially when employees are hearing about multiple benefit options at once. Take-home materials give them a chance to revisit the information on their own time, review it with family members and make more informed choices. These materials extend the value of your meeting and support confident decision-making long after the presentation ends.

Make it visual. Design handouts or digital PDFs that are easy to scan. Use icons, charts and short callouts to explain the core offerings, eligibility and value.

Keep it practical. Offer side-by-side comparisons of benefit options, checklists for next steps and summaries of any new or voluntary benefits introduced.

Make it accessible. Host materials on the member portal and email a link after the meeting. Let employees and their families review information together when it works for them.

Reduce the noise. Clear, well-designed materials reduce confusion, support decision-making and cut down on post-meeting questions to HR.



+ Simplify Enrollment With Custom Print Materials

New Benefits creates branded, easy-to-understand materials that help employees grasp key benefits and take action. From summaries to comparison charts, our custom print solutions reinforce your message and reduce HR follow-up – and are available in both print and digital formats. [Learn more.](#)

TIP 08

Make Time for One-on-One Questions

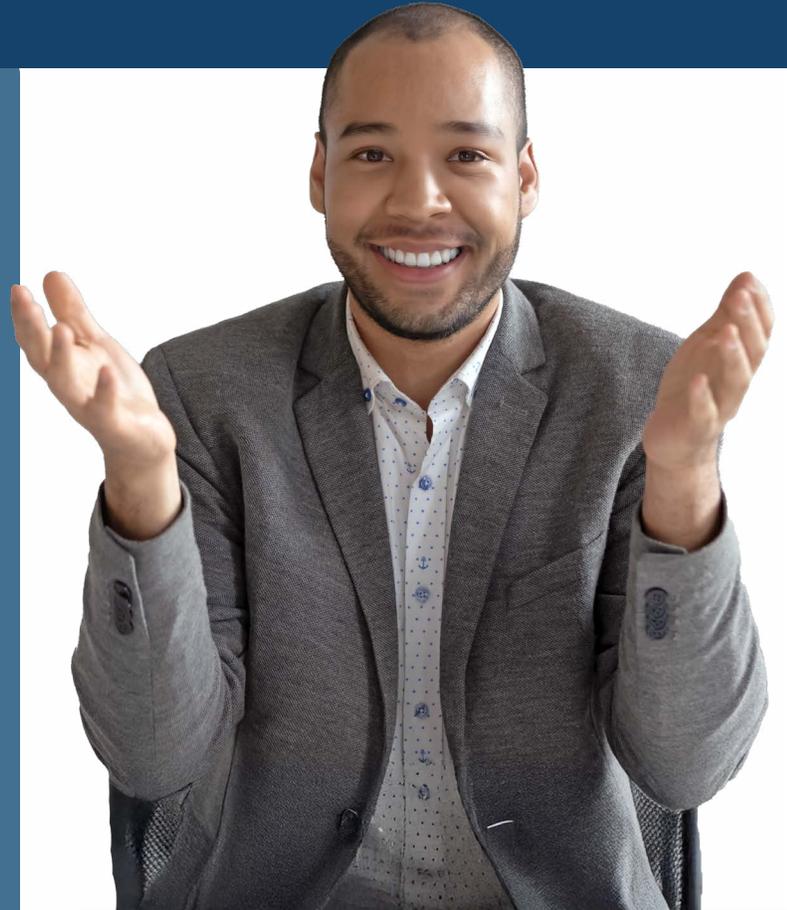
Some employees need a private space to ask questions – especially about personal or sensitive topics like health conditions, family coverage or financial constraints. Group settings can feel intimidating and unanswered questions often lead to confusion or inaction. Creating opportunities for individual follow-up demonstrates that employees are supported and gives them the confidence to make the right benefit choices.

Offer private follow-up. Set aside time for one-on-one chats with HR or benefits reps. These can be quick, confidential and scheduled in advance or post-meeting.

Use anonymous tools. Provide a way for employees to ask questions anonymously – through digital forms or written comment cards – so they feel comfortable speaking up.

Share what others ask. Collect common questions and turn them into a post-meeting FAQ. This helps other employees who may have the same concerns.

Show you care. When you make time for personalized attention, you build trust. Employees feel supported and more confident in their benefit decisions.



+ Let Us Handle the Admin Work

New Benefits takes care of the back-end tasks – implementation, billing, member support and ongoing maintenance so your team can focus on what matters most: educating clients and driving engagement. With responsive service and streamlined processes, we make it easy to launch and manage your non-insured benefits program with confidence.

[Learn more.](#)

TIP 09

Keep Virtual Meetings Just as Engaging

With more remote and hybrid workforces, virtual open enrollment meetings have become the norm for many employers. But without the right planning, these sessions can feel impersonal, passive or easy to ignore. The key is to approach virtual meetings with the same intention and creativity as in-person sessions – using tools, visuals and interactivity to keep employees engaged and informed from start to finish.

Make it interactive. Use polls, chat features or breakout rooms to keep employees engaged. Ask for input. Get feedback. Make the meeting feel personal, even on a screen.

Use your tools. Share your screen to demo the member portal. Show employees how to compare plans or access support. Bring benefits to life with real-time walkthroughs.

Shorten the session. Break up longer meetings into smaller parts or sessions by topic. Keep each one under 30–40 minutes to avoid screen fatigue.

Always follow up. Record the meeting for on-demand access and share all materials digitally afterward. Make it easy for employees to review and act, even if they couldn't attend live.



+ Streamline Management With the Client Portal

Our secure, web-based Client Portal puts everything in one place – ID cards, utilization reports, plan materials, compliance documents and more – so you're always ready to support employees and manage your program efficiently. Whether you need to answer a question on the fly or prep for your next enrollment meeting, the tools you need are just a few clicks away. [Learn more.](#)

TIP10

Follow Up With a Recap and Feedback Loop

The enrollment meeting is just one part of the process. What happens afterward can be just as important. Without a clear recap or feedback loop, even a great meeting can lose momentum. Building this follow-through into your open enrollment strategy shows employees they're supported and shows your clients that you're thinking beyond the presentation.

Send a recap. Within a day or two, email a short summary with key points, enrollment links and deadlines. Include links to the member portal and any materials you referenced in the meeting.

Ask for member input. Use a short survey to capture feedback – what worked, what was unclear and what could be better. That helps you and your clients refine the process for next year.

Track outcomes. Monitor engagement and enrollment metrics. Did more people sign up for voluntary benefits? Were there fewer questions post-meeting? Use those insights to demonstrate success and shape your next strategy.

Keep it going. A great open enrollment season includes support before, during and after the meeting. Let employees know you're still available – and interested in helping.



+ Compliance Made Simple and Stress-Free

New Benefits closely follows discount medical plan legislation and consumer protection laws, and we build this compliance into every program so you don't have to manage it alone. Our team ensures our benefits stay aligned with state and federal regulations – minimizing your risk.

[Learn more.](#)

Let's Elevate Open Enrollment

Open enrollment is a powerful opportunity to connect employees with the resources that support their lives and strengthen their company's investment in them. As a broker, you play a key role in shaping that experience. With the strategies in this guide – and support from New Benefits – you can host open enrollment meetings that inform, engage and deliver value.



Our team is here to help.

New Benefits has worked with thousands of brokers to design custom benefit packages that boost engagement, wellness and productivity.

With 40+ non-insured benefits, a turnkey member portal and app, and personalized print and communication tools, we make it easier to inform employees and drive lasting results.



**Ready to deliver a better
open enrollment experience?**

Let us help you design a benefit
solution that fits your client's needs.

Contact us at 844.529.5785
or NewSales@NewBenefits.com

Learn more: [NewBenefits.com](https://www.NewBenefits.com)