



# Sample Marketing & Communication Plan

The key to a successful implementation of pre-tax benefit account plans is communication. But, sometimes that is easier said than done. We recognize that every employer is different and may have different communication needs. Our goal is to provide you with a variety of resources to help make it a little easier.

**Need some help?** BRI can send Open Enrollment emails on your behalf. Simply visit our OE Email Request Page on [BenefitResource.com](https://BenefitResource.com), select your chosen template, upload a list of email addresses for eligible employees through the Secure Employer Portal, and select the date you want the email to be sent. We take care of the rest. Looking to customize your message? Contact [marketing@benefitresource.com](mailto:marketing@benefitresource.com) with your desired changes. Please allow at least 5 days for customization requests.

## PRE-IMPLEMENTATION

### “IT’S COMING” COMMUNICATION

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Any time you are introducing a new benefit it is best to proactively communicate this change. This is especially important when introducing a plan such as an HSA. If an employee is not aware, a decision regarding benefits under a spouse’s plan can affect their eligibility for HSA contributions. If they know in advance, they can consider all relevant factors.

- Develop a custom communication that clearly outlines the types of changes you anticipate making and the timing of those changes.

## INITIAL ANNOUNCEMENT

### ANNOUNCEMENT TO EMPLOYEES

Provide employees with an announcement regarding the new program. The announcement may include an invitation to an information/enrollment session that they may attend and/or instructions for enrolling in the benefit. We have a variety of options available.

- Posters/flyers for common areas and for distribution
- [Email invitation](#)
- Transition communication for participants in the existing plan(s) who would be impacted by the vendor change

### INTRANET CONTENT AND LINKS

Integrate content into an intranet site. This is helpful both during initial enrollment and can be an ongoing reminder of the benefits available.

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- [Presentations](#) / PDFs to make available to employees
- Summary of program
- Links to informational [videos](#), tax savings [calculators](#), and enrollment login

### HANDOUTS

Describe what each account is and how they work.

- [Plan brochures](#)
- [Frequently Asked Questions](#)

### TRAINING / ENROLLMENT SESSIONS

Group and one-on-one support to educate, communicate and enroll employees in benefit plans.

- In-person and web-based training for employees

## ENROLLMENT / POST-ENROLLMENT

### WELCOME MATERIALS

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Employees can often feel overwhelmed with information at open enrollment. Our materials make things simple to help minimize this feeling.

- Beniversal Card and mailing
- Frequently Asked Questions on using the Card
- Participant Welcome Letter (template)

## ONGOING PARTICIPANT COMMUNICATION

### BRIPULSE PARTICIPANT NEWSLETTER

Monthly participant communication with relevant plan information, legislative updates, and tips for making the most of their accounts. Participants will be initially opted-in to receiving these communications but can individually opt-out at any time.

### PERIODIC ANNOUNCEMENTS AND ALERTS

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On an as-needed basis, BRI will send announcements to participants. These may include new limits, law changes affecting how they use the account, and product enhancements.

### RESOURCES FOR ANYTIME

These items are a good way to provide reminders and tips for using their accounts throughout the year. Also, see our Blog for regular ideas for messaging and content.

- [Resource Center](#)
- [Commuter Resource Center](#)
- [Frequently Asked Questions](#)
- [BRiBlog Articles](#)

## ONGOING ENROLLMENT (NEW EMPLOYEES)

### ANNOUNCEMENT PACKET

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Electronic or hardcopy packet to provide employees with an overview of the program. This packet includes a link to enroll, plan specifications, and link to the enrollment session recording.

## FIND EVERYTHING YOU NEED IN OUR RESOURCE CENTER

Our **Resource Center** features [videos](#), [infographics](#), [email templates](#), [FAQs](#), [brochures](#), [calculators](#), and more. By having all of the materials in one place, employers and employees alike can find exactly what they're looking for – no matter what their needs are.

### HOW TO USE THE RESOURCE CENTER:

- Go to [BenefitResource.com/resource-center](https://BenefitResource.com/resource-center) or navigate to it under the Resources tab.
- Use the on-page search bar to find what you're looking for, or use the filters to narrow down your search by Audience, Product, Content Type, and/or Use Case.

**Looking for Open Enrollment materials?** Use the 'Open Enrollment' Use Case filter. Then filter by 'Employers' for things to help you communicate during Open Enrollment like presentation slides and email templates. Or filter by 'Employees' for materials your employees can use to make informed benefits decisions like brochures, calculators, forms, videos, and more!