



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 offers an email communication tool through the Secure Employer Portal. Simply select from a variety of introduction email templates, upload a list of email addresses for eligible employees 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 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 change.

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 existing plan 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 calculator, 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

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WELCOME MATERIALS

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.

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PERIODIC ANNOUNCEMENTS AND ALERTS

On an as-needed basis, BRI will send announcement 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

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ONGOING ENROLLMENT (NEW EMPLOYEES)

ANNOUNCEMENT PACKET

Employees 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 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 or navigate to it under the **Resources** tab.
- Switch to either the **Employees** or **Employers** tab in the table, depending on what materials you're looking for.
- Use the filters to narrow down your search by **Product**, **Content Type**, and/or **Use Case**.

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