



EMPLOYER ACTION GUIDE

Benefits Engagement: Is This Thing On?

You've sent emails, hosted webinars, and posted flyers. And still, employees don't know what benefits they have or how to use them. People don't think about their benefits until they need them. And then, it's often a moment of stress, instead of simplicity.

Engagement is a team sport

Engaging employees early and often demands a team approach! A close alignment with your vendor partners and collaboration across the organization is key to success. Effectively engaging employees with their benefits falls on HR, however, it is ultimately a marketing function. Thinking like a marketer and borrowing best practices from your marketing colleagues is a great first step to driving action!

Strong engagement needs an always-on communications plan built with participation across stakeholder teams: internal communications, leadership, people managers, and partners. Yes, the message matters, but the plan and coordination behind it matters just as much.



1. Think like a marketer



Leverage insight into internal culture, communication rhythms, and what's already on employees' plates to create compelling content.



Create tailored content and timing based on your org's population and communication style.



Seek access to internal stakeholders like communications or leadership, who can amplify the message and help unlock internal channels.



Employ tools that reduce your team's lift, not add to it, such as ready-to-use content, flexible messaging formats, and feedback loops.



Set realistic expectations of what success looks like, based on workforce dynamics.

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2. Know your people

Engagement works when it reflects how employees live and work. As in marketing, you have to meet people where they are, and that starts with asking the right questions:



How do employees get information: Slack, shift huddles, email, or digital signage in the breakroom?



Who influences their decisions: a manager, a peer, or a family member?



Are your employees in front of desks, on the road, in the field?



What language actually resonates, and what gets ignored?



What motivates them: urgency, trust, simplicity, or a testimonial?

3. Take inspiration from consumer behavior

Build awareness and personalize the message.

Understand that seeing a message one time doesn't move people. Once you craft an engaging message, you must stay top-of-mind which means repeating it across different channels to be effective. Your "billboard" needs to be accompanied by a targeted email campaign. It's never either or, but both.

Human stories resonate.

We can't resist a feel-good story and we want to see "people like us" succeed! Work across teams to surface positive stories about how people are using their benefits. Video is a great medium for this and social media is the perfect channel to amplify the story and reach more people.

Meet them where they are.

Over 90% of Americans use a smartphone. They are accustomed to downloading apps, getting push notifications, and doing everything from the small screen. Why should benefits communications be any different? Communications should meet people where they are, and often, that's on their phone.

Be relevant.

Leverage moments that matter. Have a clear plan for leveraging moments that matter, not just open enrollment, but onboarding, life events, and key refresh points.

4. Put the playbook into action

Turning alignment into action.

Once everyone is aligned, the next step is execution. That means clearly defined roles, open communication, and regular check-ins to stay on track.

To move forward, employers and partners should:

- Set shared goals and agree on what success looks like.
- Involve leadership early so they can help amplify the message.
- Coordinate messaging across internal teams and timelines.
- Review results together and adjust based on what's working.

Successful benefits engagement shows up in the follow-through. This is where engagement efforts start to take hold and can drive meaningful change.



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