Welcome to Benefits Zone! Here's your handy checklist as you move towards Open Enrollment. Email bridget@benefits.zone or support@benefits.zone with any questions.

Step 1: Customize Your Toolkit *(due: as soon as possible after case creation)*

- ☐ Brand your case's benefits toolkit with the company's color *Tip: Keep the default blue or use the RGB value of a color in the company's logo*
- ☐ Make the toolkit instantly recognizable with the company's logo and unique keyword *Tips: 1. Crop the logo to a rectangle and icon to a square 2. Make sure to adjust the keyword on the app's business card 3. Adjust "Employee" in Employee Benefits Toolkit to "Voluntary" if needed.*
- ☐ Customize the toolkit's screens based on the case's benefits offerings *Tip: The "Contact Dialog Page" contains the contact information for the case. It's not listed along the bottom of the app but is important to update.*
- ☐ Upload brochures and rate sheets
- ☐ Connect employees with the resources they need by customizing the toolkit's buttons

Step 2: Add case agents and other stakeholders (*due: after toolkit customization*)

- ☐ Add agents to the case
- ☐ Add HR user to the case
- ☐ Add Broker user to the case (if applicable)
- ☐ Encourage agents to log in and take the dashboard tour
- ☐ Review the agent contact information in the "Contact Dialog Page" of the toolkit and confirm it's accurate.

Step 3: Prepare for text message communication *(due: two weeks prior to OE start date)*

- ☐ Adjust the fillable fields in the communication timeline template, download and send it along with the HR authorization form to the case's HR team. Check out a sample email to HR here.
- ☐ Email support@benefits.zone with any requested changes to the text messages and confirm HR approval of the text messages from HR.
- ☐ Receive census upload confirmation email
- ☐ Review employees in case dashboard
- ☐ Schedule campaign messages

Step 4: Review the toolkit and prepare for launch

- ☐ Check the toolkit business card for correct logo, case name, and keyword
- ☐ Review all of the buttons in the toolkit and confirm an accurate destination. *Tip - text the case keyword to 36260 to install the app for testing.*
- ☐ Confirm HR approval of communication schedule
- ☐ Check the scheduled campaigns
- ☐ Confirm HR email sent prior to OE start date

Best Practices - Building the Toolkit

- Add scheduling and enrollment links to the Manage Case tab and include in the toolkit if available.
- Include at least one call to action on each screen of the toolkit (schedule, enroll, etc.).
- Keep screen names short to avoid wrapping to a second line.
- Keep button labels short and clearly identifiable ("ADP login" instead of "Login").
- Schedule text messages for Tuesdays, Wednesdays, or Thursdays when possible.
- Allow at least 3 days between text message campaigns.

Best Practices - Managing Enrollment

- Bookmark your dashboard or add it to Favorites and log in daily.
- Review employees in the High Engagement lead group.
- Cross reference "Clicked Schedule" tags with upcoming meetings.
- Ask agents to follow-up with highly engaged employees as needed. Move to "Engaged and Warm" next, and conclude with "Installed App" if time allows.
- Read unread text messages and reply with a predefined message if needed.