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? Check out the Email Communication Tool. 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.

Timing	Item/Event	Description / Purpose
Pre-implementation	**It's Coming Communication** - Develop a custom communication that clearly outlines the types of changes you anticipate making and the timing of those change.	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.
Initial Announcement	**Announcement to employees** - 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	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 in the Communication Tool.
	Intranet content and links - Presentations / PDFs to make available to employees - Links to informational videos - Summary of program - Link to tax savings calculator - Link to enrollment login	Integrate content into an intranet site. This is helpful both during initial enrollment and can be an ongoing reminder of the benefits available.
	Handouts - Plan brochures - Frequently Asked Questions	Describe what each account is and how they work.
	Training / enrollment sessions - In-person and web-based training for employees	Group and one-on-one support to educate, communicate and enrollment employees in a commuter benefit plan.

Enrollment / Post-enrollment	**Welcome Materials** - Beniversal Card and mailing - Frequently Asked Questions on using the Card. - Participant Welcome Letter (template)	
Ongoing Participant Communication	BRiPulse Newsletter (participant version)	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	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 - BRiWeb and BRiMobile Flyer - Healthcare Resource Center - CBP Resource Center - Sample Eligible Expense List	Employees can often feel overwhelmed with information at open enrollment. 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. Below we have included direct links to a few of the popular topics that are aimed at improving employees' understanding of their benefits.
Ongoing Enrollment (New employees)	Initial announcement packet with link to enroll, plan specifications and link the recording.	Electronic or hardcopy packet to provide employees with an overview of the program. Along with instructions for enrolling.

Sample Ongoing Communication Opportunities

Employees can often feel overwhelmed with information at open enrollment. These items are a good way to provide reminders and tips for using their accounts throughout the year. Also visit the BRiBlog regularly for additional topics and ideas.

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Popular Employee-targeted Blog Posts

Topic	Description	FOR	Timing
How do I check my balance? https://www.benefitresource.com/blog/check-balance-walk/	Walks through the different options for accessing the balance for your pre-tax benefit accounts	ALL	Within 30 days of enrollment
Tips and Resources for Every New Plan Participant https://www.benefitresource.com/blog/tips-and-resources-for-every-new-plan-participant/	An overview of the common tools and resources for using with your pre-tax benefit accounts	ALL	Within 30 days of enrollment
Claims Submission Walk Through https://www.benefitresource.com/blog/submitting-claims-walk-through/	Walks through the process of submitting a claim either through BRiWeb or the BRiMobile app	FSA HRA CBP (Parking)	2-3 months post enrollment
Five Basic Questions to Ensure Your Receipt is Accepted https://www.benefitresource.com/blog/receipt-accepted/	When submitting claims or requested receipts, make sure it is accepted every time.	FSA HRA	2-3 months post enrollment
What is substantiation and why is it required? https://www.benefitresource.com/blog/what-is-substantiation/	Discusses what substantiation is and why it is sometimes required.	FSA HRA	3-4 months post enrollment
Best Practices to Avoid Receipt Requests https://www.benefitresource.com/blog/avoid-receipt-requests/	Covers tips participants can use to prevent (or reduce) the number of receipt requests they receive.	FSA HRA	3-4 months post enrollment
4 Quick Tips to make the most of your FSA https://www.benefitresource.com/blog/make-the-most-of-your-fsa/	Positioned as an end of the plan year tips	FSA	30-60 days prior to year-end
Quick Reference Guide to Acronyms used in Benefits https://www.benefitresource.com/blog/quick-reference-guide-to-acronyms-benefits/	Downloadable infographic with key terms and acronyms found with pre-tax benefits accounts.	ALL	Anytime
Getting Ready for Tax Time https://www.benefitresource.com/blog/getting-ready-for-tax-time/	A review of the documents and reporting requirements associated with an HSA	HSA	February / March