

BENEFITS COMMUNICATION

Year-Round Benefits Communication Checklist for HR

Use this checklist to ensure your organization is effectively communicating employee benefits throughout the year. Proactive, consistent communication supports better understanding, utilization, and satisfaction.

MONTHLY TASKS

- Send a short employee newsletter highlighting benefits updates or seasonal tips
- Promote one specific benefit or perk (e.g., EAP, wellness program, telehealth access)
- Review any recent claims or questions to identify communication gaps
- Post a reminder or Q&A in your internal HR system or bulletin board

QUARTERLY TASKS

- Schedule a virtual or in-person Q&A session with HR or your benefits consultant
- Feature a 'Did You Know?' benefits myth buster or success story
- Update HR team on legislative/compliance changes and prepare summary messaging
- Review enrollment and utilization trends with your broker or consultant

AFTER MAJOR LIFE EVENTS

- Send reminders about benefit-eligible life events (e.g., birth, marriage, divorce)
- Ensure employees know how to update elections or add dependents
- Provide quick reference guides for life event-based benefit changes

NEW HIRE ONBOARDING

- Include personalized benefits education as part of onboarding
- Provide a clear benefits packet with FAQs and contact info
- Schedule a benefits walkthrough within the first 2 weeks

PRE-RENEWAL & OPEN ENROLLMENT PREP

- Conduct pre-renewal planning sessions with your benefits consultant
- Begin messaging changes at least 60 days before enrollment opens
- Create an open enrollment communication calendar
- Gather employee feedback to tailor communication materials