

# 5 tips for getting plan members to open your materials

Susan Deller | March 16, 2016



According to the results of [a recent survey by the International Foundation of Employee Benefit Plans](#) the top challenge with benefits plan communication is getting participants to open and read materials. With so many competing interests constantly vying for our attention, this is hardly a surprise. Here are five tips for grabbing plan members' attention:

## **1. Make sure frontline leaders play a *visible* and *vocal* role in promoting your message**

Your members will always take their cues first and foremost from their leaders, both official (such as managers) and unofficial leaders (influencers). Your frontline leaders need to understand that they have an important role to play in promoting important messages, such as getting people to complete their annual benefits re-enrolment or informing them of a change in investment options.

These leaders need to understand and support your objectives. They also need to be equipped to respond to questions – or, at the very least, know where to direct members for more information.

## **2. Don't waste time on “off-the-shelf” communication**

Pension and benefit plans are complicated enough without giving your members the extra challenge of sorting out whether the investment classes described in the newsletter they just received actually apply to their plan, or if dental implants are a covered benefit. Your job is to capture attention and then keep the information relevant and meaningful to your audience.

## **3. Target your message**

Blasting out information that is not relevant to all members can drain your communications budget and undermine the effectiveness of your program. Younger employees have different financial priorities, health needs and learning styles than boomers closing in on retirement. High-income earners have different concerns than hourly-paid workers, and so on. Tap into your plan's demographic data to deliver the right message to the right audience at the right time.

#### **4. Keep it short, compelling and personal**

Quick, clear communication makes an impact. Give members short nuggets of information that can be absorbed quickly and entice the audience to learn more. Getting bogged down in details is one of the biggest pitfalls of pension and benefits communication – and one of the biggest turnoffs for your audience.

All plan communication, whether an email, newsletter or video, should present key points or action items early. And, it should help your members answer a very important question – *what's in it for me?*

#### **5. Lighten up!**

Face it, no one really wants to think about the possibility of death or disability. And the mere mention of retirement saving is enough to send most Canadians into a depressive funk. But that doesn't mean your communication has to look or sound like a tax notice. Laugh-out-loud humour might be asking too much. But tone, language and imagery can be inviting or discouraging, authoritative or friendly. Don't be afraid to show you care.

If after trying these tips, your member communication efforts still don't gain any traction, it might be time to shake things up. Busy, budget-strapped organizations often don't like the idea of wholesale change. But understanding when it's time to reassess not just your communications strategy, but your pension and benefits plan designs – and maybe even your overall organizational effectiveness – can pay off in the long run.

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