

CHECKLIST | BENEFITS COMMUNICATION CALENDAR

Presented by Parrott Benefit Group

A benefits communication calendar is a structured, annual plan that outlines key details about sharing benefits information with employees. For example, the calendar can outline what will be communicated, when it will be delivered, who it is for and how it will be shared. This calendar may be used by company leadership, HR and benefits teams, or communications departments. Rather than reacting to questions or deadlines, organizations can proactively guide employees through key benefits moments, such as open enrollment, life events, wellness initiatives and reminder campaigns throughout the year.

Employers often underestimate how complex benefits feel to employees. Medical, dental, retirement, financial wellness and voluntary benefits can create cognitive overload, especially when communication is rushed. As a result, some organizations may first assess organizational and employee healthcare literacy to understand their current levels and opportunities for improvement. Then, the company could develop a more specific communication plan to educate employees year-round about the topics they are most interested in or confused about.

A well-planned employee benefits communication calendar helps employers deliver the right message to the right audience at the right time. Use this checklist as a suggested step-by-step process of building and maintaining an effective employee benefits communication calendar. Components and the overall goal can also be implemented less formally at smaller organizations.

Developing a Communication Calendar	
Inventory all benefits and perks that are offered to employees, including: <ul style="list-style-type: none"> • Health plans • Retirement and savings programs • Wellness program offerings • Employee assistance program offerings • Voluntary benefits • Paid leave policies 	<input type="checkbox"/>
Compile all benefits-related requirements, including: <ul style="list-style-type: none"> • Notices • Compliance communications 	<input type="checkbox"/>
Align communications to the employee lifecycle, such as: <ul style="list-style-type: none"> • New hire onboarding • Life events (e.g., marriage, birth and relocation) • Open enrolment • Wellness initiatives • Retirement or financial planning milestones 	<input type="checkbox"/>

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<p>Identify annual “anchor” moments, or fixed points around which the calendar will revolve, including:</p> <ul style="list-style-type: none"> • Open enrollment and renewal periods • Midyear benefit reviews and wellness campaigns • Year-end planning and reminders 	<input type="checkbox"/>
<p>Determine a communications strategy to educate employees on their benefits and improve their healthcare literacy. Consider these key examples:</p> <ul style="list-style-type: none"> • Encourage employees to revisit their benefits elections to understand what’s available for the year. • Share tips for setting health and financial goals. • Provide guidance for preparing for a primary care visit, including questions to ask. • Highlight budgeting resources and employee discount programs. • Promote mental health benefits, counseling and digital therapy tools. • Promote health savings account and flexible spending account contributions. • Provide resources to help employees learn more about their available benefits, including what is (and isn’t) covered and related costs, and how to be an engaged healthcare consumer. • Share health plan comparison tools and personalized recommendations. 	<input type="checkbox"/>
<p>Define target audiences. It’s important to try to segment communications where possible, such as:</p> <ul style="list-style-type: none"> • New hires vs. tenured employees • Full-time vs. part-time employees • Remote vs. on-site teams • Managers vs. individual contributors • Employees with dependents 	<input type="checkbox"/>
<p>Select communication channels that have their own purpose and may vary depending on the employee group or the specific message being shared. For example, it may be helpful to use a mix of:</p> <ul style="list-style-type: none"> • Email • Intranet or benefits portals • Webinars or live meetings • Short videos or visual guides • Manager toolkits 	<input type="checkbox"/>
<p>Build the calendar framework by mapping out components, such as:</p> <ul style="list-style-type: none"> • Communication topics and objectives • Timing and frequency • Audiences • Channels • Internal owners 	<input type="checkbox"/>

Once built, the communications calendar must be actively managed. Maintenance turns a static plan into a living strategy.

Maintaining a Communications Calendar	
<p>Balance education, reminders and promotion to help prevent information burnout while reinforcing value. Effective calendars include:</p> <ul style="list-style-type: none"> • Education to explain how benefits work • Reminders tied to deadlines or actions • Promotion of underused or lesser-known benefits 	<input type="checkbox"/>
<p>Assign clear ownership to prevent the calendar from becoming outdated or ignored. Maintenance requires accountability, so clarify:</p> <ul style="list-style-type: none"> • Who updates the calendar • Who creates and approves content • Who delivers communications • Who tracks results 	<input type="checkbox"/>
<p>Monitor employee engagement and feedback to understand what’s working and what needs adjustment. Use available data to assess effectiveness, such as:</p> <ul style="list-style-type: none"> • Benefits utilization trends • Open enrollment participation • Email engagement metrics • Employee survey feedback • Common HR questions 	<input type="checkbox"/>
<p>Refine and adapt throughout the year. A strong maintenance process allows employers to:</p> <ul style="list-style-type: none"> • Adjust messaging based on feedback. • Add or remove communications as priorities shift. • Respond to organizational or regulatory changes. 	<input type="checkbox"/>

Use this checklist as a guide when developing and maintaining an employee benefits communications calendar. For further assistance with employee communication, contact Parrott Benefit Group.