



ANOTHER OPEN ENROLLMENT. ANOTHER PICKLE.

Most benefits platforms:
8–10% engagement
a whiff, not a game plan.

Medefy clients:
up to 70% adoption
that's a SMASH.

Here are 3 open enrollment plays and exactly how they did it

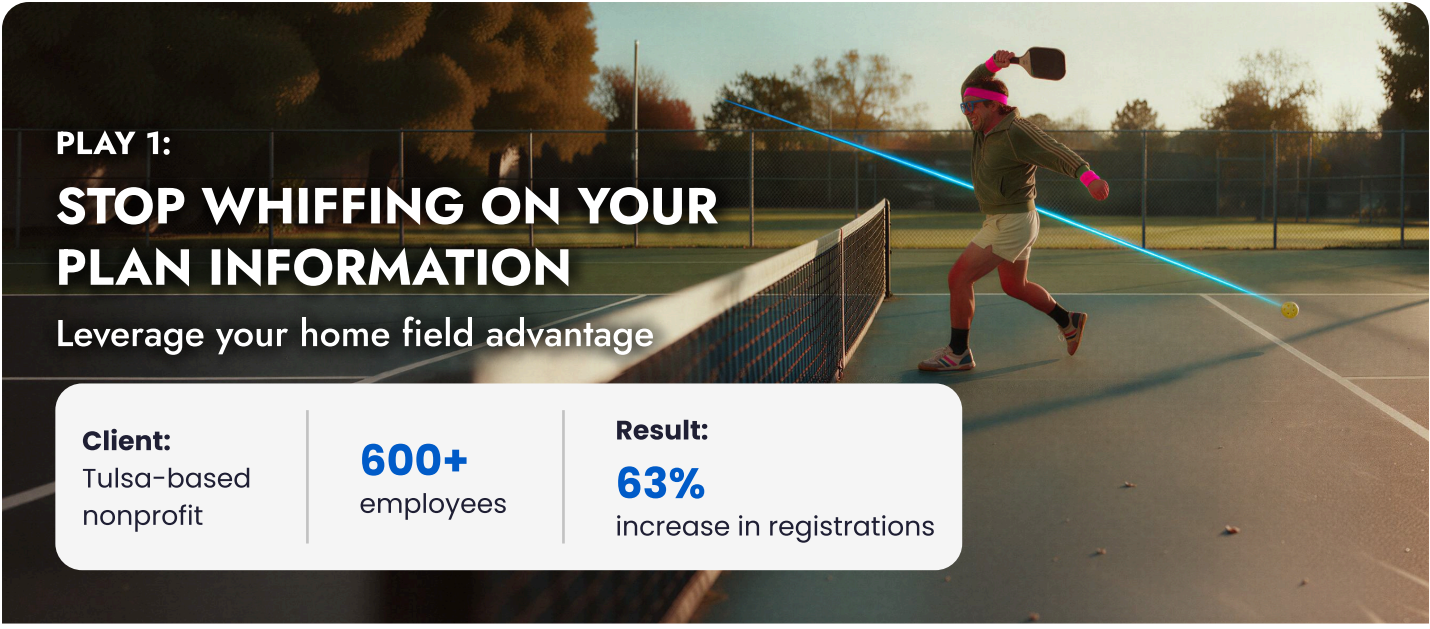
Open Enrollment Starts at the First Login, Not the Finish Line

Most platforms measure success at “enrolled.” We measure it at “opened the app and came back.” Two hurdles decide whether a benefits platform ever gets used at all: getting someone to download it in the first place, and getting them to log in again on their own, without being told to. Most platforms never clear either one.

Other platforms will tell you an algorithm can find the right plan for your workforce. That’s only half the story. The plays in this guide didn’t come from a model — they came from real employers who ran them, with Medefy alongside every step.

How to Use This Guide

Each play below follows the same structure: what the client did, what it produced, and how to run it yourself — regardless of your platform, your workforce size, or where you are in this year’s enrollment window. None of these require new budget. All three were run by real HR teams and brokers, not consultants.



PLAY 1:

STOP WHIFFING ON YOUR PLAN INFORMATION

Leverage your home field advantage

Client:

Tulsa-based
nonprofit

600+

employees

Result:

63%

increase in registrations

The workforce:

This nonprofit focuses on early childhood education and family services and operates across multiple centers throughout one metro county. Its workforce is spread across locations rather than centralized in one office, which is exactly why a single, companywide communication strategy mattered.

“The strongest plays don’t feel like they came from a vendor, they feel like they came from you.”

This organization’s HR team has always been unusually hands-on with its benefits program. Heading into open enrollment, they moved all their plan information into Medefy and required every employee, across every center, to complete an Electronic Consent Notice inside the app — for many, the first time they’d ever downloaded it and logged in. Every communication went out from the organization’s own domain, under its HR leader’s name, so it read as coming from HR, not a vendor. Registrations increased 63%.

What that first login turned into:

Adoption has reached as high as 98% of this workforce, with 92% engaging over the life of the partnership. That kind of sustained use shows up directly in the data: employees and Medefy’s Care Team have exchanged more than 63,000 messages working through the specific benefits generating the most questions, including no-cost pathways for diagnostics, primary care, and prescriptions — plans that only pay off if people know how to use them. As one of the organization’s HR leaders put it: a plan is only as good as what people actually use.

Run it yourself:

Step 1

Centralize your plan information in one place

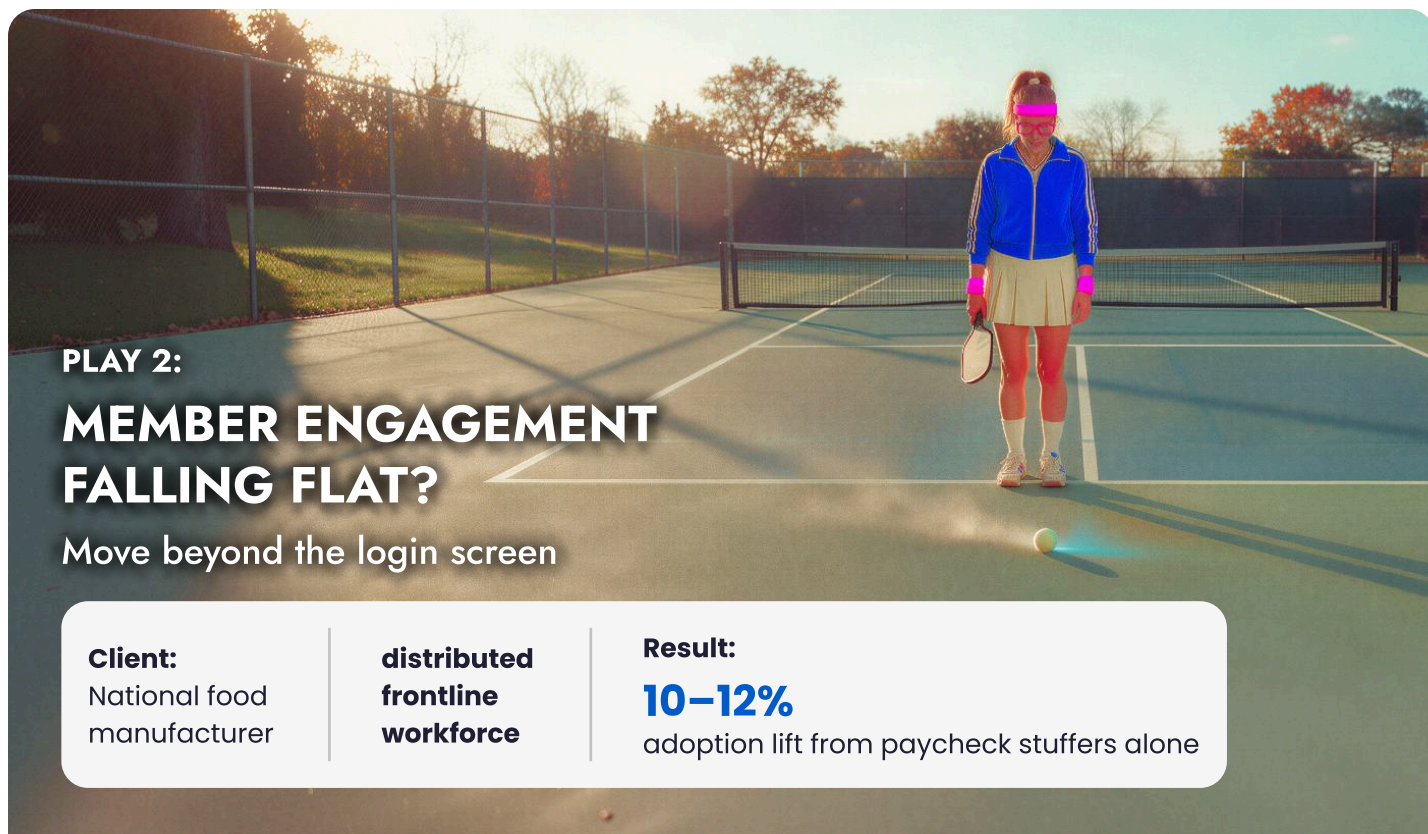
employees already trust, instead of scattering it across systems.

Step 2

Send every **enrollment communication** under your own name and domain — not a vendor’s.

Step 3

Build one required step into enrollment that gets people to open the benefits navigation app and log in for the first time.



The workforce:

A protein-processing food manufacturer supplying restaurant chains and retailers, with production facilities spread across several states. Its frontline workforce works in plants rather than at desks, where email is rarely the primary way people receive company communications, and where a meaningful share of employees communicate first in Spanish.

Not every employee reads their work email closely — and for this employer, that meant looking past the inbox entirely for the channels that would actually reach people. Their approach ran across every physical touchpoint available: paycheck stuffers with QR codes linking straight to the app, breakroom and office graphics, and branded materials — all available in Spanish alongside English. The paycheck stuffers alone drove a 10–12% adoption lift.

Where this fits:

This play earns the most when part of your workforce isn't reliably reading email — frontline, multi-site, deskless, or multilingual teams especially. If most of your population is desk-based and already opens email, treat this as a supplement to Play 1's required step, not a replacement for it.

Run it yourself:

Step 1

Audit where your workforce's attention actually goes beyond email — breakrooms, paychecks, shared physical spaces.

Step 2

Put a scannable, **direct path to the app** in places members already are.

Step 3

Translate materials into the languages your employees actually speak.



PLAY 3:

OUT OF PICKLE (AND INTO MOMENTUM)

Turn incentives into resounding rewards

Client:

Austin-based
fintech company

2,500+
employees
worldwide

Result:

nearly 1 in 5
employees adopted within days of rollout

The workforce:

A financial technology company headquartered in Austin, Texas, serving financial institutions, with a global workforce split between U.S. and international offices. As a newly onboarded client, it had no existing benefits-app habit to build on and no single site where everyone could be reached in person at once.

This employer was a newly launched client with no existing habit to build on — so instead of a single launch push, they built momentum with a high-value incentive tied directly to enrollment: a series of prize drawings staged across several months, including one timed to a benefits fair. Within days of rollout, adoption approached 20%.

Where this fits:

This play is built for a specific moment — a first launch, with no existing habit to build on. If your program already has some engagement baseline, a staged incentive is still worth running, but expect a smaller lift than this employer saw, since part of that near-20% number reflects going from zero to something rather than improving an existing rate.

Run it yourself:

Step 1

Stage incentive moments across the full enrollment window instead of front-loading them into a single push.

Step 2

Tie at least one moment to a live event people are already attending.

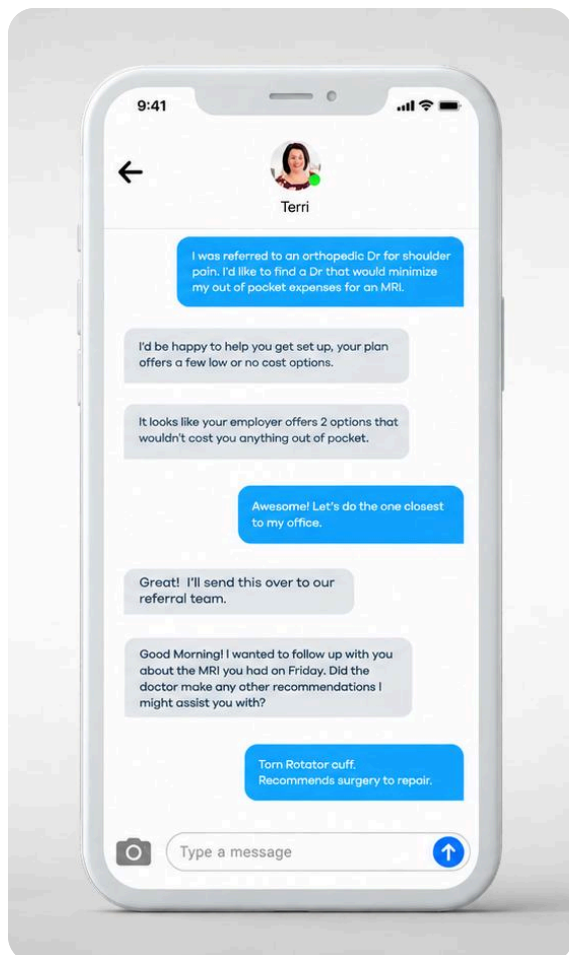
Step 3

Treat the incentive as a nudge, not the whole strategy.

Which Play Fits Your Workforce

Play	Lever	Works best when	Effort
Home Field Advantage (nonprofit, 600+ employees)	Centralize + require one step	Centralize + require one step	Low — no new budget
Beyond The Screen (food manufacturer, frontline workforce)	Reach beyond email	Workforce is multilingual, multi-site, or deskless	Medium — print/signage
Resounding Rewards (fintech, global workforce)	Stage an incentive	New or stalled program, no existing habit	Medium — incentive budget

What's Actually Inside the App



Before the plays — a quick look at what employees actually get once they've downloaded it, since every result below runs through this.

Benefits and healthcare are confusing by default. That's the reason live Care Guides sit inside the app, available 24/7 — not just for the employee, but for their spouse and dependents on the plan too.

This is where a login actually pays for itself. Before an employee goes in for a procedure or imaging their doctor recommended, a quick message to a Care Guide can flag whether that provider is in-network — the difference between routine care and an unplanned bill that can run into the thousands. Care Guides can point to the highest-quality option that also costs the least, and help transfer records so switching providers costs the employee nothing but a text.

When a bill or an Explanation of Benefits shows up in the mail — the single most confusing piece of paper in this entire process for most employees — a photo sent to a Care Guide gets it explained in seconds, not a phone queue.

All in one place:



Live Care Guides, available 24/7, for the employee and anyone else on their plan.



In-network guidance before a procedure or imaging appointment, so a routine visit doesn't turn into an out-of-network bill.



Bill and EOB translation — a photo in, a plain-language explanation back, entirely confidential.



Dental, vision, life insurance, 401(k), and insurance cards, all under one login, on whatever device the employee already carries.



**THAT'S THE MECHANISM BEHIND
EVERY RESULT IN THIS GUIDE**

The numbers change by workforce, the app underneath doesn't.

Bringing the Plays Together

These three plays aren't mutually exclusive, and the strongest open enrollment periods usually combine more than one: centralizing information and requiring one in-app step gets people in the door; reaching people beyond email makes sure the message doesn't stop at whoever reads their inbox closely; and timing an incentive to the moments people are already paying attention keeps momentum from fading once the initial push is over. None of the three require new budget, and none require waiting for next year's enrollment cycle.

READY TO RUN THESE PLAYS?

The ball's in your court — talk to our team and explore better outcomes.

TALK WITH SALES