Comm Team

Q4 Communications:
What You Need to Know

October 2025

As we dive into our busiest season (cue the dramatic music), we want to make sure you have everything you need to serve your clients well. Here's what's new and what to keep in mind as you work with the communications team!

Additional Topics

- **Wellness Benefit Communications** are live and ready to use here. Share these with clients before year-end so their employees can take full advantage of available wellness benefits.
- **Medicare materials** can be found in the Resources Hub on Monday.com. Please use those resources, as the communication team doesn't host Medicare content.
- **Need something custom?** Submit a communications request with a detailed overview of your messaging needs. During Q4, help us prioritize by noting whether your request is urgent or can wait until 2026.

We're Here For You!

We know Q4 can sometimes feel like this I Love Lucy scene. But don't worry, we can handle whatever comes down the belt together (and avoid the chocolate-stuffed cheeks).

Q4 Expectations

Timelines: Please allow **two weeks** for requests to be completed, with delivery by end of day on your selected date. Need it sooner? Specify that in "Event Dates." Keep in mind that turnaround times depend on several factors:

- Scope and number of items requested
- Whether all necessary information is provided upfront
- Your responsiveness in providing clarifications and approvals
- Our team's current capacity. With the high volume of requests during Q4, please plan ahead and avoid promising same-day or next-day turnarounds to clients.

Your role in the process: Please remember, the communication team handles design and formatting, while consultants handle benefits details. We're not responsible for inputting or verifying benefits information, sending materials to clients, or filling out benefit guides.

⟫ **Please see the next page for an overview of our preferred process for creating communications.**

Communication Team's Recommended Process

To set your clients up for success, we recommend this approach:

1. **Start with strategy.** Schedule a call with your client's team and use our consultation questionnaire (available in internal resources) to understand their communication needs.
2. **Build a campaign.** Based on your client discussion, create a suggested communication plan with recommended materials and timeline. Get client buy-in before moving forward.
3. **Pull templates.** Download relevant templates from the communication hub.
4. **Submit your branding request.** Use this link and be sure to provide logos, photos, and colors.
5. **Fill out materials.** For guides, use the guide checklist from internal resources to complete materials accurately. This step is essential for ensuring benefits information is correct.
6. **Get formatting help if needed.** Email the communication lead for specific formatting questions.
7. **Send drafts directly to clients.** Building this direct relationship ensures prompt delivery and strengthens your client connections.
8. **Make revisions.** Adjust based on client feedback, reaching out to the communication team if you need support.
9. **Share final drafts.** Once approved, send the communication team lead a link to the finals so we can stay informed and provide support if needed.
10. **Review results.** For tracked communications and microsites, we'll send analytics after open enrollment. Check with clients about any desired changes to microsites after open enrollment. We'll make updates based on their input without requiring a new request.

Questions?

Communication procedures are available in the Resources Hub on Monday.com if you need a refresher on our processes and internal resources. To find them, go to the Monday.com board, locate the "Procedures" group, and click on "Employee Communications Procedures."

Remember: the communication hub and O drive remain your go-to spots for templates, tutorials, FAQs, and more. If you have general communication questions, please email us at BenefitsCommunicationTeam@cb-sisco.com. We're here to help you deliver great communications to your clients this season!