

6 Go-To-Market Steps for a Successful AEP Campaign in 2022



Start preparing now for the U.S. Health Insurance Annual Enrollment Period (AEP) with our handy step-by-step guide.



1

Audit your content

Taking the time now to collate and review the content used and needed by your client-facing functions will pay dividends when it comes to delivering materials later down the line:

- **FUNCTIONS:** Marketing, membership, customer care, claims and pharmacy
- **DIGITAL ASSETS:** Websites and social media
- **DOCUMENTATION:** Marketing brochures, sales kits, enrollment materials/forms, welcome kits, information guides, summaries of benefits, evidence of coverage, and annual notices of change
- **MEMBER COMMUNICATIONS:** Letters and emails, call centers, online chat, etc.

2

Cultivate your linguistic assets

Avoid rework: Managing your assets efficiently will help you avoid starting from scratch every year. Investment in—and regular maintenance of—linguistic assets will ensure that your translated materials are not only created on time and under budget, but that the content is accurate and consistent, and resonates with your members:

- **STYLE GUIDES:** Used to set the stylistic preferences of all documents and how the content within those documents is to be handled, including font and formatting requirements, date formats, template instructions, brand analysis, and language register.
- **GLOSSARIES:** Used to capture and dictate the specific terminology to be utilized in your translated content, as well as key terminology and units of meaning to ensure consistency across languages.
- **TRANSLATION MEMORIES:** A suite of technology tools that empower translators to leverage repeated text from previously translated content to improve consistency and turnaround times.



3

Establish your project plan and clear timelines

Workflows for Open Enrollment translations revolve around the (typically) staggered releases of the CMS templates in June and the beginning of the official AEP in November. During this period—or ideally starting before—health insurers need to carve out time for pre-flight planning, which includes: review of scope, the number of languages and plans, and of course document preparation, translation, document management, editing, and review. Here is a high-level overview of how this could look:

- **APRIL-MAY:** Collate, review and prepare last year's plan, templates and assets, and prepare materials ready to be updated.
- **MAY-JUNE:** Review prepared content based on CMS guidance or any changes to your organization's roll-out requirements (e.g., additional languages/changes to required documents).
- **JUL-OCT:** Revise and update translated content to ensure it is fully optimized for your target markets. Don't forget to prepare member welcome guides, not only enrollment kits!
- **OCT-NOV:** Take the time to step back and consider what worked well and what didn't. You should always conduct 'lessons learned' sessions but by doing so now you can make sure you document everything when memories are fresh. Now is also the time to ensure that related functions, such as your member call centers and claims processing functions are also fully equipped with the linguistic support they need.
- **DEC-APR:** It is never too early to begin preparing for next year. Take every advantage of what we call 'low tide', i.e., those quiet periods before the storm. Your Language Service Provider (LSP) should already be knocking at your door to discuss what worked, what didn't, as well as next year's planning process.



4

Don't forget to plan for alternative formats...

Accessible formats such as large print, audio, and braille enable effective communication with hard of hearing, visually impaired, and blind consumers. Delivering your materials in such formats is vital for ensuring regulatory compliance with the Americans with Disabilities Act. Understanding the need for, and production workflows of, alternate formats will allow you to integrate them into your regular workflows. Transcription is a service quite distinct from translation, so make sure you plan for them separately.

5

...or to plan for member communications

Prompt access to local language support can be as essential to the success of Open Enrollment as translation of written materials:

- **MEMBER CALLS/LIVE CHAT:** Ensuring “In-language” communication—whether through bilingual staff or with the support of an over-the-phone interpreting (OPI) call center—will enable you to handle potential member queries, client interactions, and vital clinical information effectively. As call volumes can vary, it is also important to ensure you have a trusted partner to handle call overflow to provide interpretation for languages you may not support internally.
- **MEMBER-SPECIFIC COMMUNICATION (LETTERS/EMAILS):** There can be multiple templated versions of member letters within a single organization, so it is important to know how many templates and how many versions of each template exist. Ensuring consistency in letter template formatting is key for a smooth handoff with your printer, so make sure your language services partner understands your template methodology and standards so that they can be mirrored in the target language. The same applies to emails if you are to ensure that all your client-facing staff use the same visual and linguistic approach to their digital communications.



6

Define the process with your LSP

Experience, processes, and technology are as integral to the successful language management of AEP materials as translation expertise. Most LSPs follow established processes for their translators, editors, and quality controllers, but not every LSP employs this focus to the program as a whole. Our experience has been that project management processes and technology are vital at every stage, from keeping sensitive documents confidential to final versioning control. Just as important, we strive to understand our clients' project goals, so that we can look beyond the minimum translation requirements to help them deliver on the bigger picture, reduce spend and time to market, and beat the competition as well.

Partner with an Open Enrollment specialist who can help you achieve your objectives for this year's AEP.

