

2015 IABC Bronze Quill Awards Entry — Work Plan

Entrant: Gabrielle Loring, Kaarina Marsili and Victor Villanueva	Division and Category: Division 2: Communication Management; Category 6: Internal Communication
Organization: ROC Group	Entry Title: Engaging RR Donnelley’s Workforce in Medical Benefit Decisions
Time Period: September through December 2014	Entrant’s Role: Project Manager

Brief Description

Through a four-tiered communications approach, RR Donnelley engaged its workforce in making decisions about choosing medical benefits and using the resources available year-round. This approach focused on giving employees the information they needed when they would need it — that is, just-in-time communications.

1. Business Need/Opportunity

RR Donnelley (NASDAQ: RRD) is a leading communications management services provider, whose businesses include printing, fulfillment and business process outsourcing. RR Donnelley ranks 268 on the *Fortune* 500 list of America’s largest corporations and has 57,000 employees worldwide (35,000 in the U.S.). Similar to other organizations of its size and complexity, RR Donnelley must work to stay competitive in a challenging global economy. According to the RR Donnelley 2013 Annual Report, “Because the markets in which the Company competes are highly competitive, the Company must continue to improve its operating efficiency in order to maintain or improve its profitability.”

For RR Donnelley and its employees, success requires a shared responsibility to manage costs, including those related to health care. Among private-sector employers, health care accounts for nearly 8% of total compensation. (*Source: U.S. Bureau of Labor Statistics 2014*) And it is important to RR Donnelley for its employees to understand that, although plans are changing and costs are increasing, the company picks up the greater share of the plan expenses related to health care costs.

To help manage its health care costs, RR Donnelley introduced new medical options for 2015, with the following goals in mind:

- **Provide access to quality health care** at a cost that is affordable for employees *and* the company;
- **Give employees choices and flexibility** in medical options;
- **Provide information, tools and resources** to help employees make the best decisions — both about the medical option to choose and how to make the most of that option throughout the year.

Our challenge was to have employees understand the new medical plan options and actively choose one for 2015. To accomplish this, we created and produced four key pieces: a **preview guide, enrollment guide, user’s guide** and **calendar**.

2. Stakeholder Analysis

To help understand our audience — which included RR Donnelley’s 35,000 U.S.-based employees and their dependents — we used the company’s demographic data along with proprietary consumer data from Aon Hewitt & The Futures Company. Based on this information, we created the following audience profile:

- **Average age mid-40s** — Our messaging and images would need to appeal to employees who are mid-career, family-focused and starting to experience more health issues.
- **More male employees than females** — We knew we would need to mail materials home, since women often are the benefit decision makers.
- **A broad range from production workers to key executives** — We would need to use print to supplement the information available online, and our messages would need to be sensitive to the stretched budgets of many workers.
- **Headquarters in Chicago but most employees live and work in small communities** — We needed to use photographs that appeal across geographies (i.e., avoid too many cityscapes).
- **English as a second language** — We needed to allow time to translate key pieces for non-English speakers. (NOTE: All but the calendar were translated into Spanish, and the Summaries of Benefits & Coverage that were posted online were translated into Spanish and four other languages.)
- **Health engagement low** — Commitment to health varies by individual, although the Aon Hewitt data identified many RR Donnelley employees as being “disinterested” in health and focused on getting through day-to-day life. We needed to help employees see the benefits of good health and to get there one step at a time.

3. Goals and Objectives

Goals	Objectives/Measures of Success
Help employees pay attention and choose the medical option that best meets their needs.	<ul style="list-style-type: none"> • Have at least 50% of employees make an active medical plan election during annual enrollment. • Have at least 10,000 employees visit the combined preview and enrollment sites. • Get more than 5,000 employees to use the online tools available to help them make their enrollment decisions.
Provide information, tools and resources to help employees make the most of their medical benefits throughout 2015.	<ul style="list-style-type: none"> • Produce and distribute a medical plan user's guide (in November) and a calendar (in January) to reinforce the messages year-round.

4. Solution Overview

Based on our goals and stakeholder analysis, we knew we wanted to engage and enable employees to take action without overwhelming them. That is why we decided to spread our messaging across four pieces — so employees would get the right information when they needed it.

Key Messages for 2015: We also knew we needed to encourage employees to take an active role in managing their health care costs and well-being, so we developed the theme of **buy well, fund well, use well, be well**. The following key messages are reflected in this theme, which we refer to as the employee *health roles model*:

- The health care landscape and your role in it continue to change.
- We can help you navigate so you can make the best decisions for you and your family.
- But it's up to you to choose and finance your health care, work with your doctor, and take steps to improve your health.

Tactic	Timing/Distribution Method	Supporting Logic/Features
Decisions Ahead: A Preview of 2015 Benefits	<p>Mailed to employees' homes October 3 to arrive by October 13.</p> <p>October 13 opened the online preview period during which online tools and resources were available to help employees get ready for enrollment.</p>	<ul style="list-style-type: none"> • Unique size/folding: Had two folds to open to 17" x 22" so employees had all the info they needed in one sheet. • Used roadmap theme to walk employees through what they needed to do. • Introduced the health roles model, which would be carried through other pieces — giving employees a new way to think about health care.
Time to Decide: New Benefit Choices for 2015	Mailed to employees' homes October 9 along with their rate sheet, list of key contacts and annual notices — timed to arrive before enrollment opened on October 20.	<ul style="list-style-type: none"> • Loosely tied to the Preview Guide, as it featured a road on the cover as well, but this time during fall, with a fork to indicate a choice needed to be made. • Focused primarily on the new medical options and how to choose, what was new for 2015, and what they needed to do during enrollment. • Deliberately didn't include all enrollment details but rather where to go for more information. • Since this piece's focus is on enrollment itself, did not include the health roles model.
A Guide to Using Your 2015 Medical Benefits	Mailed to employees' homes along with their confirmation of enrollment statements (to save on postage/number of mailings to employees). This mailing was chosen so it would arrive after enrollment when employees could focus on how to use their medical benefits.	<ul style="list-style-type: none"> • Used easy-to-read, six-page gatefold format. • Heavily reinforced the health roles model: buy well, fund well, use well, be well. • Focused on how to get the most from your medical benefits.
2015 Calendar: Good Health on the Horizon	Drop shipped to work locations for distribution in early January.	<ul style="list-style-type: none"> • Serves as a year-long reminder to employees and their families of the many programs and resources available to help them improve their health. • Uses inspirational photographs taken by RR Donnelley employees to help engage employees in creating a healthier lifestyle. • Each month focused on one of the four health roles from our model, which reinforced our previous messages.

5. Implementation and Challenges

Roles & Responsibilities: Under the direction of our client RR Donnelley, ROC Group developed the content, coordinated and art directed the design, reviewed film proofs, and served as project manager for the preview guide, enrollment guide, user’s guide and calendar. Together, the RR Donnelley and ROC teams held weekly conference calls and saw the publications to their completion.

Key Challenges

- **Budget:** While we had a workable budget of more than \$100,000 for all four pieces, the challenge was to demonstrate this was money well spent. Feedback from Human Resources was that the materials were helpful, and senior management said we did a good job explaining and simplifying important information.
- **Timing:** With final decisions about the 2015 medical offerings not made until mid-July, it was a challenge to create and deliver materials in time for the preview and enrollment periods that started in October. Also, the preview period was new for RR Donnelley and increased the team’s workload during an already busy time. Detailed schedules and weekly team check-ins that focused on priority items helped us meet our deadlines.
- **Distribution:** RR Donnelley acquired several new companies during 2014, and benefits for some of their groups varied from the standard. It was a challenge to create additional communications (e.g., 10 versions of a cover letter were needed to accompany the enrollment guide) and to segment our distribution lists accordingly. One acquisition group with close to 4,500 employees needed to not only understand the benefit choices, but to get comfortable with the online tools and enrollment since they previously completed paper enrollment.
- **Photos:** We were required to select from photographs taken by RR Donnelley employees. While it was a worthwhile challenge, we were limited in our photo selection. For example, for the calendar it was a challenge to slot each month’s photo, create the main headlines, and weave a consistent story throughout the year about how employees can use their company resources to create their journey to good health.

6. Measurement and Evaluation

The table below summarizes the outcomes of implementation measured against communication objectives:

Goals	Objectives/Measures of Success	Results
Help employees pay attention and choose the medical option that best meets their needs.	<ul style="list-style-type: none"> • Have at least 50% of employees make an active medical plan election during annual enrollment. • Have at least 10,000 employees visit the combined preview and enrollment sites. • Get more than 5,000 employees to use the online tools available to help them make their enrollment decisions. 	<ul style="list-style-type: none"> • 66% of employees made an active medical plan election during annual enrollment (didn’t default into an option). <i>(NOTE: We are not able to measure how many employees defaulted on purpose because they actively desired the default coverage [that is, the default option most closely matched their 2013 coverage level and option.])</i> • The preview and enrollment sites combined had 13,388 unique visitors who viewed a total of 55,191 pages. • All of the online enrollment tools combined had 8,110 unique visitors. <p><i>(NOTE: Corporate firewalls often hide the uniqueness of visitors, so these numbers may actually be higher.)</i></p>
Provide information, tools and resources to help employees make the most of their medical benefits throughout 2015.	<ul style="list-style-type: none"> • Produce and distribute a medical plan user’s guide (in November) and a calendar (in January) to reinforce the messages year-round. 	<ul style="list-style-type: none"> • We produced and distributed the medical plan user’s guide in November, and the calendar was distributed in January. <p><i>(NOTE: The measurement of the effectiveness of these two pieces won’t be available until the end of 2015.)</i></p>