

# Steps to Spring Clean Employee Benefits Plan

## Step 1: Declutter – Keep What Works, Toss What Doesn't

A quick employee survey or casual check-ins can help you figure out what's valuable and what's just burning a hole in your budget. Gathering intel from your staff can help you craft custom employee benefits packages that buy goodwill and retention from your workforce.



## Step 2: Upgrade – Bring in the Benefits That Actually Matter

Now that you've cleared the clutter, let's talk upgrades. Modern benefits aren't just about insurance anymore; they're about supporting employees where they need it most—health, finances, paycheck security, and work-life balance.



## Step 3: Simplify – Make Benefits Easy to Use

Invest in an easy-to-use benefits platform that allows employees to explore and understand what they have. Let employees enroll, update, and access benefits without paperwork chaos. Make claims and reimbursements easy—no one wants to jump through hoops to use their own benefits.



## Step 4: Customize – One Size Does Not Fit All

Instead of guessing, ask employees what they actually want. Based on that feedback, identify gaps in your current benefits package. Whenever possible, offer flexibility—let employees choose the perks that matter most to them. This lets employees pick what fits their lifestyle while keeping costs manageable for your business.



## Step 5: Keep It Fresh – Benefits Aren't a One-and-Done Deal

Spring cleaning isn't a one-time thing (unfortunately), and neither is benefits planning. Keeping your benefits strategy up-to-date is the only way to stay competitive. Review benefits quarterly, not just at renewal time. Ensure your benefits align with healthcare mandates, retirement plan regulations, and paid leave policies.

