

Staying on Schedule for Your Best OE

Custom C&D works closely with the EB teams during OE, and we rely on your timely reviews to keep communication pieces moving and on time. We offer multiple custom client scope options, based on client approval timing.



Client approves scope by the C&D deadline

C&D will create your communication campaign as outlined in the approved strategy document.



Client approves scope after the C&D deadline (for existing clients)

Due to the compressed timeline, C&D will provide an abbreviated version of the approved strategy. Results may include (but are not limited to):

- Essential guide updates only (such as IRS limits and plan changes)
- Content-free, editable email template instead of an embedded email
- A postcard in place of a more extensive home mailer



New client approves scope less than a month before their Open Enrollment begins

To help you through OE, C&D will provide an eight-page guide, poster and postcard.

[Click here to watch the Scope Approval video](#)