

SECTION 1: COMPANY DETAILS

Company Name	Type of Business
Address	Phone
City/State/ZIP	Number of Employees
	<i>Full-time Part-time Remote 1099</i>
Payroll Frequency (including next pay date)	Payroll Company No Yes (<i>name below</i>)
Decision Maker Name(s) and Title(s)	Contact Person Name(s) and Title(s)

? Tell me what a typical day looks like at your company (blue/white collar, job duties, shifts, busiest day of the week, etc.)

? Tell me about the demographics of your workforce (age, gender, family status, average income, primary language, activity level, etc.)

SECTION 2: CORE BENEFIT DETAILS

? Do you offer your employees core benefits?
 Yes No (If no, go to Section 4: General Questions)

Section 125 (Pre-Taxing)

Premium-Only Plan/ Dates:

Broker Name

Medical Insurance

What portion of the premium do you pay?

Employee % Family %

What is the deductible?

Employee \$ Family \$

What is the copay? \$

Vision

Dental

Life Insurance

? How are benefits decisions made?

Benefits & HR Technology

Tell me about your HR pain points:

- ?** Do you currently use an HR Platform or Technology?
- ?** How are you currently onboarding new hires?
- ?** How are your benefits communicated and enrolled?
- ?** What are the open enrollment dates for your benefits?

SECTION 3: VOLUNTARY AND OTHER BENEFITS

Long-Term Disability

Health Savings Account (HSA)

Short-Term Disability

Vacation/Personal/Sick Leave Days

Accident

401K

Supplemental Health

Wellness Programs

Cancer or Critical Illness

Benefit Bank

? Is there a benefit that your employees have asked for that you are not currently offering?

? What would you NOT change about your benefits offering?

? In the last 3-5 years, have you experienced medical plan rate increases or changes? Yes No

? Do you feel employees understand and appreciate your investment in their benefits? Yes No

SECTION 4: GENERAL QUESTIONS

? If they do not offer benefits (Section 2), ask: Have you previously offered employee benefits?

If Yes What did that look like for your employees?

Why do you think it didn't work out?

If No What do you feel has kept you from offering any benefits?

? What sets your company apart in attracting, hiring, and retaining top talent compared to others in your industry?

? If one of your employees was in financial distress, would they come to you for assistance?

? Do you feel your company experiences an abnormal amount of workers' comp claims?

? If there was one benefit you could offer your employees, regardless of cost, what would that be?

SECTION 5: ADDITIONAL NOTES