

# Proactive Touchpoint Calendar

Month	Deadlines & Compliance	Health Checks	Fiduciary & Other Reminders
Jan			
Feb			
Mar			
Apr			
May			
Jun			
Jul			
Aug			
Sep			
Oct			
Nov			
Dec			

# Keep / Buy / Build Worksheet

Function	Keep	Buy	Build
Data requests			
Document chasing			
Status dashboards			
Report tracking			
ERISA §3(16) admin			
Actuarial spikes			
Payroll integrations			
Document prep			
Recordkeeping ops			

# Metrics Starter List

Leading (Proactive) Metrics	Lagging (Outcome) Metrics
<ul style="list-style-type: none"><li>First-response time to client requests</li><li>% on-time milestones</li><li>Touchpoints delivered vs. planned</li><li>Reopen/back-and-forth cycles per request</li></ul>	<ul style="list-style-type: none"><li>Net revenue retention (incl. expansion &amp; referrals)</li><li>On-time plan documents / 5500s</li><li>A/R aging buckets</li><li>NPS / CSAT; staff eNPS &amp; utilization trend</li></ul>