

# Your Employee Benefits Check-Up

What role do employee benefits play in your overall HR strategy? Are they a commodity or a way to add value to your company and help you attract and retain talent? Does your Benefits Advisor settle for getting you quotes, or do they play an active role in helping design your plan? Take this 5-minute self-assessment to determine if you have the right partners and resources in place to best support your business goals.

	YES	NO	NOT SURE
1. Have you reviewed your benefits strategy within the last 12 months to determine if it still fits your organizational strategy? (size, employee base, growth plans, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Do your benefits enhance your ability to attract and retain employees?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Do you currently benchmark your benefit programs against other companies? (similar in industry, size, geographic location, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Does your Benefits Advisor meet with you more than twice a year?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Is your Benefits Advisor transparent about how they get paid?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Does your Benefits Advisor help prepare and provide you with employee communications for open enrollment?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Is your HCM platform integrated with your benefits provider for seamless transfer of data?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Do you leverage technology, such as employee self-service, to help manage your open enrollment process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. In spite of rising health insurance costs, have you found ways to add perceived value to your employee benefit programs?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Does your organization offer voluntary benefits programs? (e.g. pet insurance, group legal, vision, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Do you offer your employees access to any wellbeing programs? (e.g. financial, social, emotional, physical, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Over the past 3 years, have you redesigned your benefit plans to minimize rate increases by increasing deductibles and/or coinsurance?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Have you reviewed your benefits contribution strategy within the last 12 months?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Have you explored alternative medical insurance funding options, including self-funding or savings vehicles such as HSAs or HRAs?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Have you conducted a dependent audit within the last 12-24 months?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TOTAL SCORE			

**Scoring Instructions:** Add up the number of YES answers to get your Benefits Check-Up score. See reverse side to analyze your results.

## Your final score:

### If you scored 12-15

- You appear to have a good grasp of your employee benefit programs and seem satisfied with your current providers. You may be happy with your current benefits strategy, but there may be better options you're unaware of. Let us know if you'd like another point of view.

### If you scored 8-11

- You're on the right track but may benefit from some extra guidance and support. Employee benefits can feel complicated, but we can help break it down for you and make sure your organization has what it needs to succeed.

### If you scored 7 or below

- There's room to create a better benefits experience for you and your organization. You may view employee benefits as an expense, but they should be seen as a way to give your business value. We can help you develop a benefits strategy to support your business and financial goals.

## How do your benefits measure up?

**Share your score with us to reveal what's behind the numbers.** We will show you how to maximize the value your employee benefits strategy brings to your organization.

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