



Discovery Questionnaire

About the Company

- What are your expectations of this meeting?
- Why did you start your business?
- What sets you apart from your competition?
- How many employees?
 - Full Time, Part Time, 1099
- Who is your payroll company?
- What is your contribution strategy?
- Do you have a strategy in place to:
 - Manage the rising costs of healthcare
 - Attract and retain quality talent

Current Benefits Program

- Who is your current broker? Are you BFFs with your broker?
- What do you like most about your current benefits program?
- What are some challenges you are having with your current benefits program?
- Who explains benefits and who do employees call with questions regarding benefits?
- Does your current broker offer free benefits education for the employees?
- What technology is being used to educate and administrate benefits?
- Who is your payroll company? Is payroll synced with benefits?

- ☐ Health Insurance *Effective Date?* _____
- ☐ Dental and Vision
- ☐ Short Term Disability
- ☐ Medical Bridge
- ☐ Critical Illness
- ☐ Accident

- ☐ Legal Benefits
- ☐ Identity Theft Protection
- ☐ Life Insurance
- ☐ Benefits Administration Technology
- ☐ Other _____

No Benefits?

- What has held you back from offering benefits before?
- Do you have a budget in mind for benefits or looking to contribute?
- How do you and your employees currently get medical coverage?

Information needed for Strategy Meeting

- Employee Census
- Invoices from carriers
- Current plan summaries
- Copy of renewal from carrier *(if applicable)*

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