CLIENT PROCESS

Discovery

Learn about the company culture, their employees, and their goals

Strategy

Employee Benefits and HR Support Strategy Recommendations

Employee Education

All Employee Meeting to give overview of new programs and schedule counseling sessions

Open Enrollment

Benefits Counseling to assist with enrolling and waiving benefits

Post Enrollment

Send Payroll reports, Submit to Carriers, Billing Reconciliation

New Hires and Terminations

Assistance with Onboarding and Offboarding

Enrollment

- ☐ Employee Education Meeting
- ☐ Benefits Counseling Sessions Scheduled
- ☐ Benefits Counselors Assigned
- ☐ Enrollment Flyers
- ☐ Enrollment Portal Ready
- ☐ Send Logins to Employees

