

Benefits Consultant Evaluation



Presidio Benefits Group recognizes that every employer has different needs and priorities. We provide comprehensive employee benefits consulting; a summary of those services is provided below. This tool quickly captures the capabilities offered by the consulting firms you are considering.

		Presidio	Option 1		Option 2	
		Yes	Yes	No	Yes	No
Service team						
Principal/Associate	Experienced business development professional with 10 to 20 years of experience in healthcare who stays actively involved in your account for the life of the relationship	✓				
Account Manager	Tenured professional with more than 10 years in Human Resources and employee benefits	✓				
Account Coordinator	Licensed insurance professional who provides on-call administrative support for claims, eligibility and billing	✓				
Director of Integrated Health Strategies	Clinical wellness expert who has developed programs that deliver clinical and fiscal results	✓				
Communications Director	Seasoned professional with more than 10 years experience delivering benefits communications	✓				
Ongoing strategic counsel						
Strategic planning	Annual calendar for delivering superior, ongoing benefits consulting and brokerage services	✓				
New client intake	Comprehensive review of current benefits and long term objectives	✓				
Pre-renewal meeting	Renewal projections, evaluation of benefit needs and budget requirements	✓				
Renewal meeting	Comprehensive renewal presentation including marketing results, analysis and recommendations	✓				
Speaker Series seminars	National experts speaking on key benefits issues twice a year	✓				
Benchmarking	National and regional benchmarking, customized by industry and area-specific reporting	✓				
Strategic partnerships	Network of firms specializing in related Human Resources disciplines	✓				
Human Resources consulting	Two hours of free Human Resources consulting services each month from ThinkHR	✓				
Performance guarantees	Subjective performance guarantee of 10% of annual compensation	✓				

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		Yes	Yes	No	Yes	No
Corporate wellness						
Strategic planning	Multi-faceted, year long plan to educate, engage and change employee behavior	✓				
Metrics	Reporting on employee engagement and utilization of medical carriers' tools	✓				
Comprehensive support	Internal well-being consultant who manages day-to-day logistics of clients' wellness programs	✓				
Employee communications	Turn-key communications delivered to your employees by Presidio Benefits Group	✓				

Vendor management

Strategic planning	Comprehensive evaluation of carriers that support clients' goals and budgets	✓				
Market analyses	Leverage market relationships through the RFP process to ensure most cost effective programs	✓				
Renewal negotiations	Negotiate vendor contracts and associated premiums	✓				
Implementation	Oversight of new vendor/plan implementation	✓				
Claims advocacy	Advocacy on employees' behalf for escalated claims issues	✓				
Billing	Research and resolution of billing issues	✓				
Eligibility	Research and resolution of eligibility issues	✓				

Compliance

Strategic planning	Review of current compliance practices and action plan to ensure full compliance with federal and state laws	✓				
New client intake	Comprehensive compliance review	✓				
Contract binder	Compilation of benefit contracts, SPD's, 5500s and other plan documents	✓				
Compliance communications	Quarterly compliance newsletter and ongoing compliance updates	✓				
Document preparation	Signature ready Form 5500	✓				
HIPAA training	Regularly scheduled trainings	✓				
ERISA attorneys	Two ERISA law firms on retainer	✓				

Communications

Strategic planning	Annual client communications plan to increase employee engagement	✓				
Open Enrollment	Customized open enrollment materials including benefits presentations, home mailings and newsletters	✓				
Benefits collateral	Customized benefits brochures	✓				
Employee benefit newsletters	Benefit newsletter, in English and Spanish, delivered every other month	✓				
Employee benefit surveys	Tailored benefit surveys and compilation of results in an Executive Summary	✓				