



Fit Matters!

Finding Your Benefits Technology Match

March 22, 2018

Note: IA is an independent advisory firm and received no compensation for this presentation

Will the webinar be recorded?



Yes!

We will send you a link to the recording



Will the slides be available?

Yes!

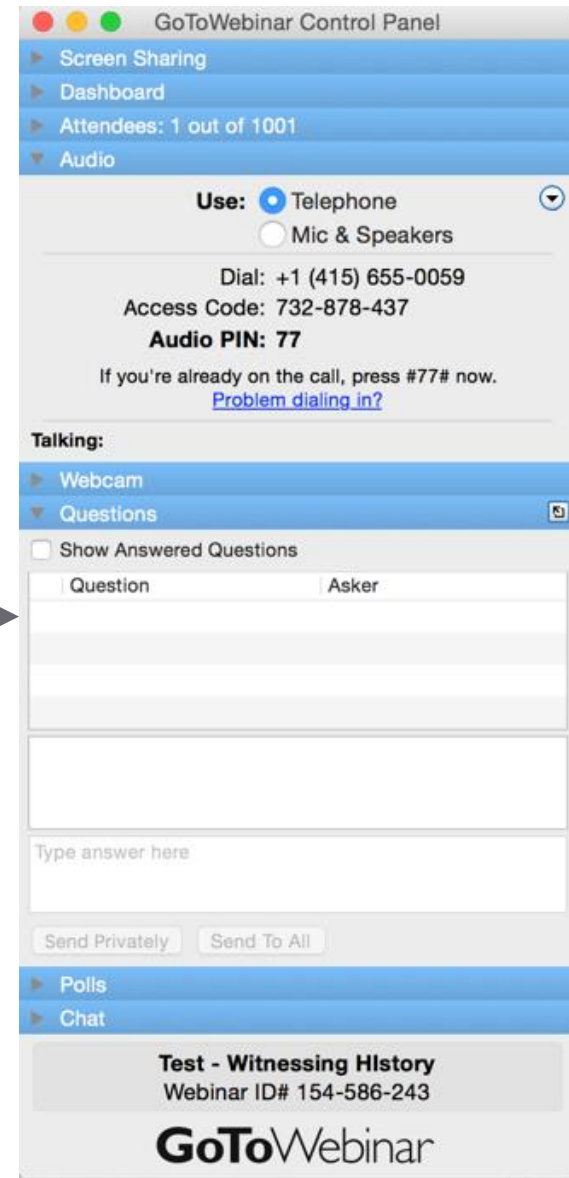
We will send you a link to the
PDF after the webinar.



Q&A

How do you ask questions?

Type your question into the
“Questions” panel





Today's Speaker



Mark Stelzner
Founder/Managing Principal
IA HR



Step 1

A photograph of a dirt road winding through a forest. The road is light-colored and leads into the distance, flanked by trees and brush. The text 'Know thyself.' is overlaid in large, white, sans-serif font.

Know thyself.

Socrates

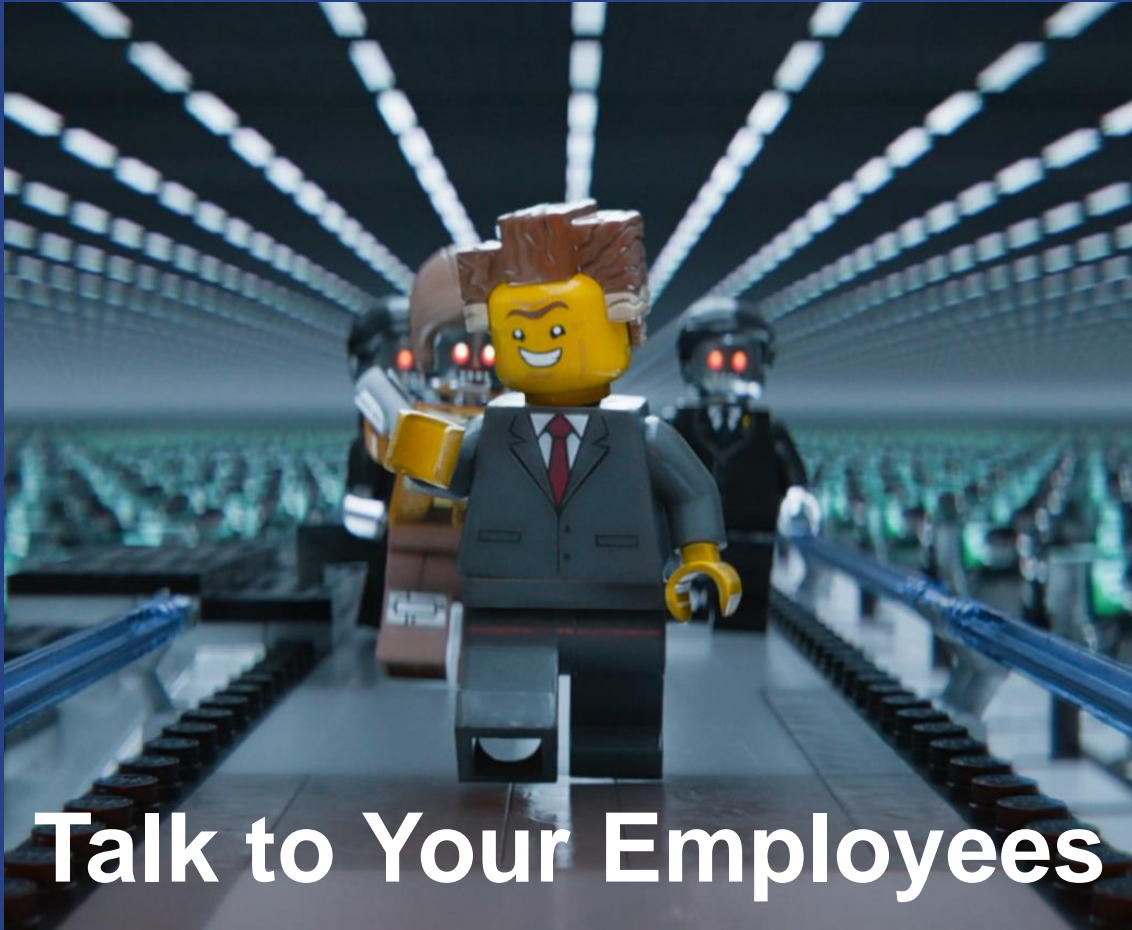
quoteancy

Answer the Hard Questions

- What do we value?
- How do we treat our customers?
- How do we treat our providers?
- How do we talk to one other?
- How do we feel about change?
- When do we work?
- How do we measure success?



Step 2



Talk to Your Employees

Benefits Administration

Benefits administration involves the creation and management of employee benefits, as well as providing a means for employees to be trained in understanding how the benefits work, and what types of standards employees must meet in order to qualify for the benefits. Benefits administration involves overseeing the health insurance coverage for qualified employees, making sure that payments are made to the insurance provider in a timely manner, as well as ensuring that every qualified employee who wishes to be included in the group coverage is processed properly.

I Will Respond Not Applicable

This topic is unclear, so skip it.

The following question asks you to rate the importance of benefits administration to the success of the business and then asks your opinion on the effectiveness of these system(s).

	Not at all				Somewhat				Extremely
How important is this function?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How effective are we in this area?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please explain your perspective

Please propose actions

What is your biggest pain point in this area?

Please provide helpful information

Cancel



Step 3

Be
TRANSPARENT



Share Everything

- Engagement/survey results
- Your EVP (factual or aspirational)
- The competitive provider landscape
- What is missing from your current solution/provider
- Your selection criteria
- Your internal readiness

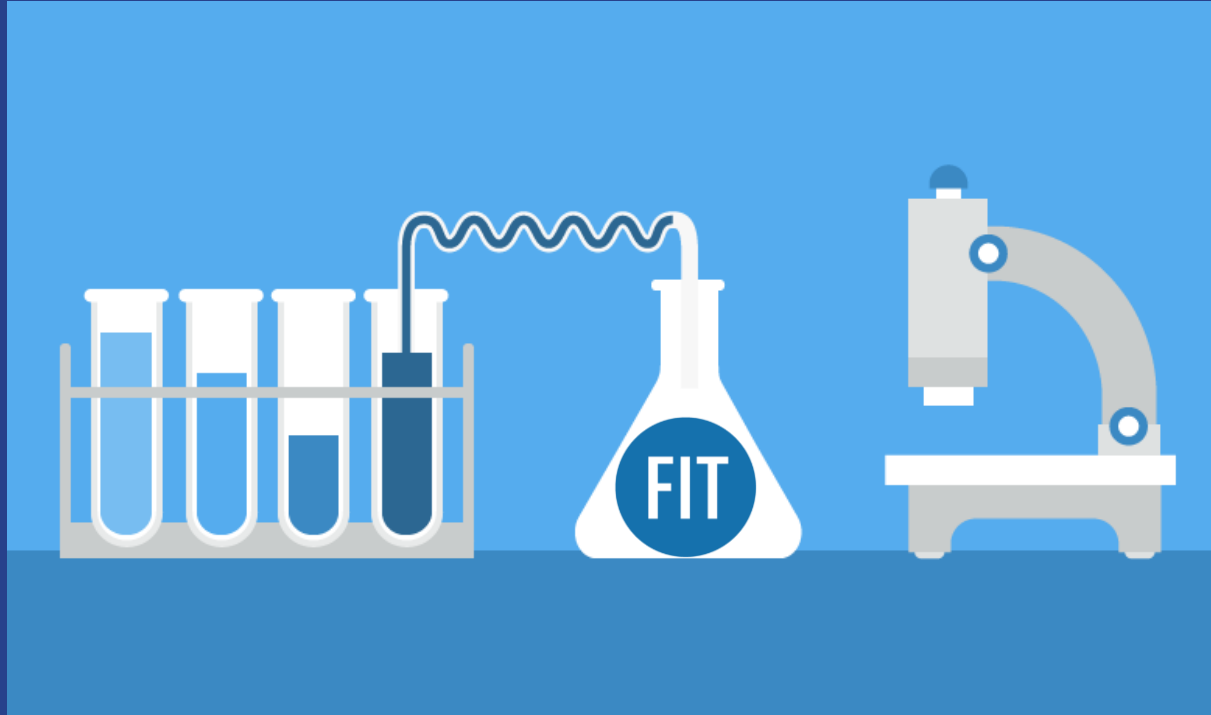


Step 4

Flip the Script.

Ask the Hard Questions

- What do you value?
- How do you treat your customers?
- How do you treat your employees?
- How do you talk to one other?
- How do you feel about change?
- When do you work?
- How do you measure success?



Assess for Fit

- Quantitative:
 - Financial Health
 - Operational Health
 - Executive Stability/Turnover
 - SLAs
 - Incentive Plans
- Qualitative:
 - Glassdoor Reviews
 - Resource Models
 - References (Formal/Informal)
 - Client Forums/Customer Base
 - LinkedIn Profiles
 - Interviews (Site Visits, Workshops)



Q&A



Thank You!

Mark Stelzner

Founder/Managing Principal

mstelzner@ia-hr.com

408-839-3734

@stelzner

linkedin/in/markstelzner

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