

BENEFITS STRATEGY

Small Group Benefits Planning Checklist

Use this checklist to assess your current benefits strategy and prepare for a customized small group solution:

- Identify your company's goals and challenges with your current benefits plan
- Review employee demographics and conduct informal feedback or surveys
- Evaluate funding options: Fully insured, level-funded, or self-funded
- Analyze network coverage and access to local providers
- Compare plan design options and align with budget
- Develop a multi-year strategy that supports retention and recruiting
- Ensure compliance with ACA, IL State Continuation, and COBRA requirements
- Plan for enrollment communication and employee education
- Prepare onboarding materials for new hires (e.g., benefit packets)
- Schedule ongoing support touchpoints (monthly newsletters, claims help, updates)

NOTES: