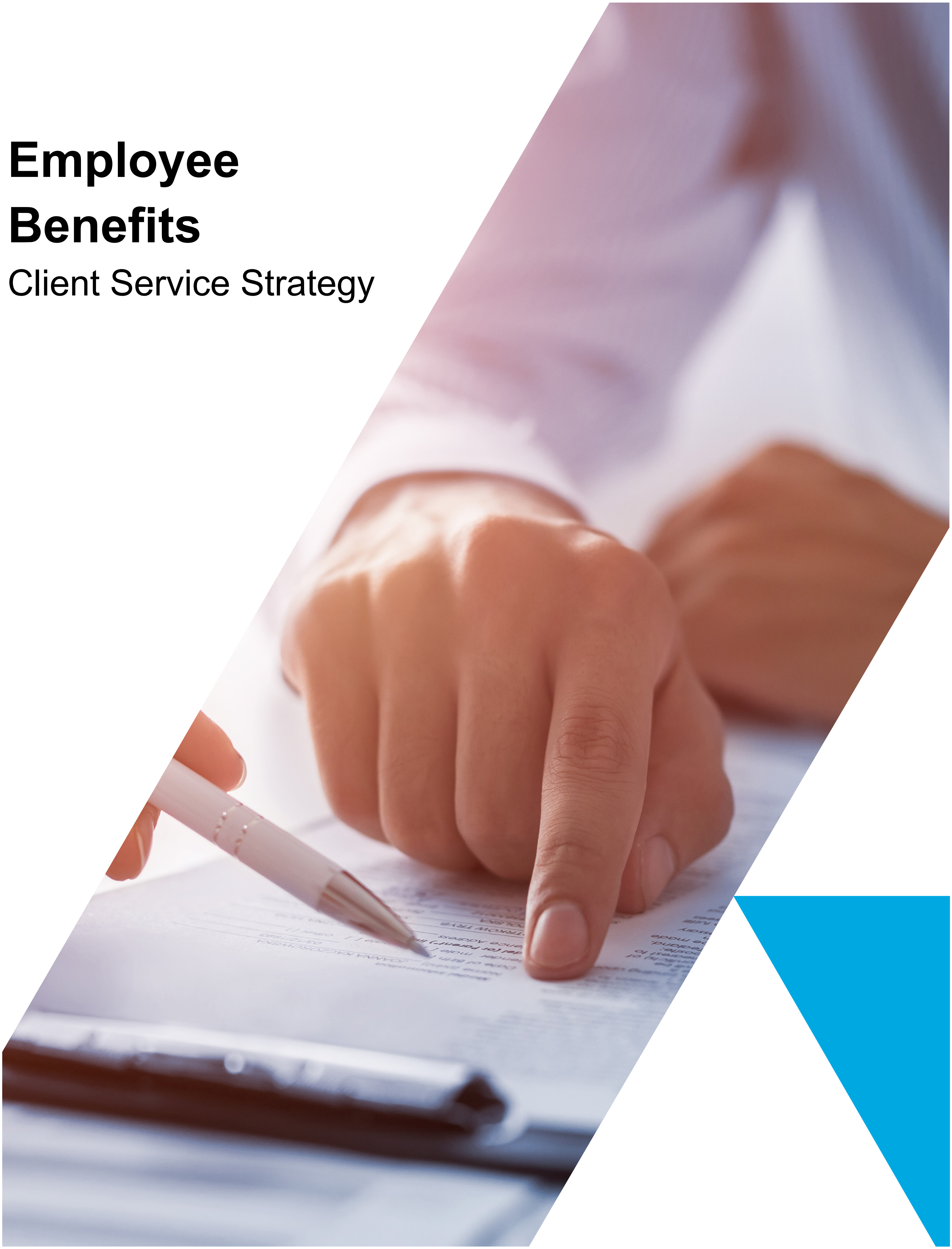
Employee Benefits

Client Service Strategy



The purpose of this plan is to illustrate our commitment to support your organization's unique benefits needs. By clarifying both parties' expectations, our desire is to promote and sustain a trusted business partnership. Our service approach is comprised of the following:

Strategic Planning

Are there any threats or challenging goals in the coming 12-18 months? Why do these matter?

1. ______________________________
2. ______________________________
3. ______________________________

	Strategic Planning	Time Frame	Notes
☐	Benefit's Vision and Strategic Plan		
☐	Benefit Planning – Fully-insured specialty Rx & Coalitions – Enhanced Telemedicine – Direct Primary Care – Captives – Enhanced Musculoskeletal Benefits – Population Health		
☐	Employee Consumerism Education		
☐	Facilitate Third Party Administration Relationships (FSA/HRA/HS A, COBRA, Flex Administration		
☐	Rx Contract Analysis		
☐	Alternative Funding Feasibility Analysis		
☐	Actionable Overspending Analysis		
☐	Retirement Benefit Solutions		
☐	Assist/Participate in Collective Bargaining Unit Negotiations		
☐	"Zero" Cost Solutions (i.e. Zero Card, Rx N' Go)		
☐	Client Interactions: – Strategy Meetings & Performance Guarantee Review – News and Updates – Executive Team Support		

☐	Customer Service Expectations: – Response Time – Routine Issue Resolution – Other		
☐	Population Health Management		
☐	Research Alternate Provider “Narrow” Networks		

HR Solutions		Time Frame	Notes
☐	Employee Hotline		
☐	Seminars / Webinars / GCG Newsletter Series		
☐	ALERAHr Certification Courses		
☐	“Living” Handbook		

Wellbeing		Time Frame	Notes
☐	Strategic Planning and/or Plan Review		
☐	Health Risk Assessments & Biometrics		
☐	Newsletters		
☐	– Campaign(s) – Activity – Holiday Maintenance – Nutrition – Other – Stress Management		
☐	Health Fair		
☐	Committee Participation		
☐	Financial Wellness Support		

Employee Communications		Time Frame	Notes
☐	Open Enrollment Meeting		
☐	Online Benefit Administration		
☐	Brainshark Benefit Presentations (Audio & Video)		
☐	Benefits Transparency & Concierge Services		
☐	Telemedicine		
☐	Decision Support In-Person and Technology		
☐	Customized Open Enrollment Documentation		
☐	Staff Surveys		
☐	Milliman Benchmarking and BPS Review		

Reporting/Analytics and Tools		Time Frame	Notes
☐	Analytics (i.e. Artemis, Deerwalk)		
☐	BPS Review		
☐	Plan Design Calculator		
☐	Renewal Analysis		
☐	Benefits CFO Platform		
☐	CAHP Report		
☐	Actuarial Plan Modeling		

Compliance		Time Frame	Notes
☐	5500 Support		
☐	ACA, Reporting and Annual Notices		
☐	Health & Welfare Compliance Checklist		
☐	COBRA / Flex Administration Review		

GCG Specialized Services		Time Frame	Notes
☐	On-Site / Near-Site Clinics		
☐	Cost-Plus Pricing		
☐	Value-Based Benefit Model		
☐	HERO Underwriting Platform		
☐	Claim Audits		
☐	Dependent Audits		
☐	401(k), 403(b) and Pension Planning		
☐	COBRA and FSA Administration		
☐	Mergers and Acquisitions Support		
☐	Executive Benefits Planning		
☐	Property Casualty Insurance		
☐	Worker’s Compensation Coverage and Safety		
☐	Risk Management / Loss Control		
☐	Group Critical Illness & Accident		
☐	Group Long Term Care		

We're excited to plan the upcoming policy year with you. To make sure it meets or exceeds your expectations, please:

- Notate those services you feel your organization may benefit by implementing in the upcoming 12 to 18 month period.
- Assign individuals within your organization to "champion" each particular chosen service.
- Let us know immediately if you have any reservations regarding the implementation of a chosen service.
- Give us candid feedback regarding any area which you regard as less than exceptional. We want to ensure a long term relationship and will do anything we can to ensure it.

This document is simply a tool to help us provide you the services you want, when you want them. It also is meant to give immediate feedback if any expectations are not met. Please acknowledge your service selections below so we can immediately make it a part of your upcoming years' service platform.

Over the last 12 months, please provide feedback regarding:

Are there any services that have been "game changers" for you, that have created the result you desired?

Are there any services that could be improved, to make them more effective?

For your next benefit year, what does the "ideal" year look like and what needs to be included?

Company Name: ____

Plan Year: ____

Date:___________________________ Signature: ____________________________________

Client Name

Date:___________________________ Signature: ____________________________________

GCG Financial