

Scorecard Discovery Session Questions

Consultants may elect to use this question guide to help facilitate the conversation when discussing the stakeholder's answers to the scorecard.

1. What are your greatest concerns?
2. What do you like most about the current situation?
3. If we were meeting in three years' time, and were celebrating the success of your organization and its employees, what goal would you be most proud of achieving?
4. What progress have you already made towards realizing your goals?
5. What roadblocks stand in your way to achieving your goals listed in question 3?
6. What are the most important actions you must take to overcome your roadblocks?
7. What actions do you need to take first?
8. If at the end of this meeting you could say 'This was a really good use of my time', what needs to happen for you to say that?
9. Since this is about you and not us, please share with us what you would like to get out of the meeting today. (This might be more appropriate for someone you know or already have a relationship with.)
10. Tell me about your current benefit plan (carrier, how long, satisfaction level)
 - a. Medical
 - b. Dental
 - c. Voluntary
 - d. Retirement
 - e. Employee/employer environment/satisfaction/issues
11. What is the goal of your employee benefits plan?
12. What are your top 2 priorities?
13. Who is the current carrier/agent?
 - a. Why do you use them?
 - b. What do you like about them?
14. What is the best thing about your current benefits?
 - a. Employer
 - b. Employee
15. What would be the first things you would change about your employee benefits?
16. What does your ideal employee benefit package look like and do for you as the employer?