

Quick Start to the Relationship Opportunity & Risk Assessment

Step #1: Rate your reaction to each pair of phrases.

We do not have a system and process to track and report service issues and provide a stewardship report	1	2	3	4	5	6	7	We have a system and process to track and report service issues and provide a stewardship report
We do not have effective project management systems and processes in place for renewals	1	2	3	4	5	6	7	We have effective project management systems and processes in place for renewals
We struggle to understand and use HR & Benefits Technology	1	2	3	4	5	6	7	We are comfortable with and use HR & Benefits Technology extensively
Technology makes our business and our lives more complicated	1	2	3	4	5	6	7	Technology makes our business and our lives simpler
We are reluctant to present new tools and capabilities to our clients	1	2	3	4	5	6	7	We are constantly presenting new tools and capabilities to our clients
Our team is not well prepared to implement, deploy and manage technology solutions for our clients	1	2	3	4	5	6	7	We have a robust back-office technology team supporting our clients
We are frustrated with the results of our effort to develop an effective technology team in house	1	2	3	4	5	6	7	Our effort to develop an effective technology team in house have been highly successful

Step #2: For each response, answer these questions:

- Why did I give myself this score?
- What can I do to improve this score?

Step #3: Flip page over and complete the **Confidential Questionnaire**



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The Confidential Questionnaire

#1: If you had your choice which would you prefer?

- To be self-sufficient in deploying technology and license tools that allow us to control and manage the entire process
- To partner with vendors who provide complete technology support

#2: Are you satisfied with your average group size?

- Yes
- No

#3: If you answered "No" to question #2, list three reasons why you are as yet unsuccessful in doing business with your preferred group size?

#4: When you want to present new ideas, products or services to clients, which statement describes how it usual goes?

- My clients always take my call because they trust me to bring relevant, timely and valuable ideas, products and services to their attention
- I wait until renewal and insert new ideas, products and services into the renewal as value added items
- The less I say the better

#5: What are your greatest concerns?

#6: What do you like most about your current situation?

Step #4: Send your contact information and completed Quick Start to Mathew Augustine

Name: _____ Agency: _____

Mobile: _____ Email: _____



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