



Case Generator Worksheet

What cases come to mind when reading the following scenarios?

- Organizations that will not or cannot manage payroll deductions.
- Organizations capable and willing to manage payroll deduction but not reliable to pay premiums in a timely manner.
- Affinity groups like Unions, Associations, PEO's, looking to attract and retain membership or employees but don't have viable ways to collect premiums consistently.
- You have a great rapport with a Public Sector organization and need to bypass payroll because once payroll deduction is chosen, your products may not survive the RFP process.
- An organization is looking to avoid sporadic payroll challenges and maximize gig worker loyalty.
- Organizations that have a large "bench" of part-time or 1099 workers that they want to retain for potential full-time positions, but do not want to manage deductions until they have full-time status.
- Organizations capable and willing to enter deduction amounts but do not have the bandwidth to manage ongoing reconciliation and payments of carrier invoices.
- Organizations concerned with future situations that may arise with furloughing employees and not having to manage the back-and-forth payroll status related to those decisions.
- Organizations wanting to retain their flex workers and employees within seasonal industries.
- Organizations which do not have payroll deduction decision making control as they are part of a parent company.
- Organizations with the burden of administering multiple insurance products through multiple carriers.