

Are you Getting Maximum Results from Your Health & Welfare Consulting Partnership?

Review the below criteria and place an X by the answer that fits best. You may wish to ask several people in your organization to complete this worksheet and compare scores.

	Evaluation Criteria	True	False
1.	My H&W benefits environment (strategic initiatives, design, cost containment/reduction goals, employee needs) has not changed materially in recent years.		
2.	My assigned consultant team is experienced and the team has been stable for years (minimal or no turnover).		
3.	The services delivered by my consultant team consistently aligns with my organizational culture and achieves required outcomes (solutions are creative and custom to my organization versus generic).		
4.	I have reviewed competitiveness of the services, cost, and overall results of my H&W consultant partnership in the last three years.		
5.	I am fully aware of the overall revenue my consultant is receiving (i.e., direct fees, commissions, credits) relative to the services I am receiving.		
6.	The number of H&W consultant partnerships I am managing are optimal.		
7.	My current H&W consulting partner has the right expertise – use of expert specialty providers is not needed (e.g., communications).		
8.	The scope of services with my H&W consultant partner is clearly defined and I do not experience out-of-scope project expenses.		
9.	I am not paying for services I do not need within the core scope of services with my H&W consultant partner.		
10.	I know what actions I can take to improve the value of my H&W consulting partnership.		

If you indicated false on four or more items, you should consider further reviewing the effectiveness of your consulting relationship.