**PBR Research & Questionnaire**

**Pre-meeting Research**

1. Current services:
2. Current rates:
3. Dash Evaluation:
   1. Frequency:
   2. Employee count:
   3. Workers Comp codes and rates in system:
   4. Client processing online / users logging in:
   5. Cost Centers / Dept Structure:
   6. Custom Reports:
   7. Retirement deductions:
   8. Benefits deductions:
4. Review Zendesk tickets
   1. Any recommendations you would make as a result of the client’s existing tickets?
5. Client industry/ any specific laws for that industry

**PBR Questions:**

1. Current state of communication / service?
2. Upcoming business changes? How did you adapt to COVID? What’s been the impact on your company? (Labor shortage? Cost of goods?)
3. Are there ways you feel payroll processing can be made more efficient?
   1. What do you know about our Dash system?
4. How do you track hours for employees? (Or, how is our timekeeping system working for you?)
5. Reporting needs data discussion. Do you find yourself exporting and manipulating data?
   1. Workers Comp discussion. Carrier? Would you like us to send data directly to the carrier? (We can do so as the broker.)
   2. Do you offer benefits? How do you handle benefits enrollment? (Is it online? How do you manage that data in Dash?)
6. Are you familiar with CalSavers?
7. Are you aware of the specific law for your industry / employee count (where applicable)?
8. Have you updated your employee handbook for new CA laws?

**Post-meeting Process:**

1. Create individual tickets for each action item generated as a result of the PBR.
   1. CC client on these tickets so they can follow our progress.
   2. These tickets will be assigned and completed by Operations.
2. Create an internal PBR ticket using the PBR ticket type.
   1. Subject line: “Client ID” – PBR Completed
   2. Do not cc the client.
   3. Include the above ticket numbers (created from action items).
   4. Assign the ticket to the Customer Service Manager.
3. Log PBR as a Task in the CRM.
4. Create a Task in the CRM with a future date for the next PBR.