

The Employer Renewal Delegation Matrix™

See What Requires Your Team's Decisions —
and What Stays Organized Behind the Scenes

A successful renewal depends on clear roles. Your broker advises, your team makes business decisions, and Renewal Relief™ keeps the process organized and moving.



BROKER / ADVISOR

Advises

Provides strategy, plan and carrier guidance, renewal pricing context, and recommendations.



YOUR TEAM

Decides

Makes budget, contribution, plan, and business decisions.



RENEWAL RELIEF™

Coordinates

Organizes the process, tracks deadlines, gathers information, coordinates stakeholders, and supports implementation.

	BROKER / ADVISOR	YOUR TEAM	RENEWAL RELIEF™
 1. PREPARE 90 – 61 DAYS	- Provides renewal timeline expectations - Requests needed information	- Shares goals, priorities, and budget considerations - Identifies internal stakeholders	- Organizes timeline and kickoff - Gathers current plan details and internal information - Tracks outstanding items
 2. EVALUATE 60 – 46 DAYS	- Provides renewal pricing, quotes, and market guidance - Explains plan or carrier options	- Reviews cost impact and employee priorities - Prepares internal questions or preferences	- Organizes leadership review meetings - Compiles comparisons and decision notes - Tracks follow-up questions
 3. DECIDE 45 – 22 DAYS	- Answers final strategy questions - Confirms recommended options	- Makes final plan and contribution decisions - Approves renewal direction	- Coordinates approvals - Communicates decisions back to the broker - Prepares implementation timeline
 4. IMPLEMENT 21 DAYS – LAUNCH	- Confirms final setup requirements - Supports final benefits questions	- Reviews employee communication plan - Supports internal rollout	- Coordinates enrollment preparation - Tracks missing items and deadlines - Supports carrier submission - Final audit and confirmation

Why This Matters



Avoid
internal
confusion



Keep broker
communication
moving



Stay organized
before deadlines
become urgent



Your Broker Advises. You Decide. We Keep It Moving.

Renewal Relief™ helps employers stay organized, responsive, and prepared without replacing the existing broker relationship.



CHECK MY RENEWAL READINESS



BOOK MY READINESS REVIEW