

DeMayo Law Offices Onboarding & Annual Planning Calendar

Month	Year	Task	Participants
June	2021	New Client Onboarding	
		(1) Kick Off Meeting	DeMayo & Ironwood
		a. Provide Ironwood contact sheet and claims cards	
		b. Discuss current initiatives, determine goals and objectives	
		c. Set meeting schedule for the quarter/year	
		(2) Internal Onboarding	Ironwood
		a. Set up carrier access & process for new hires/terminations	
		b. Gather plan documents	
		c. Request claims experience and utilization data	
		d. Set up DeMayo team for Ironwood tools/services	
		i. Think HR	
		ii. Compliance Dashboard	
		iii. Ford & Harrison	
July	2021	Program Analysis	
		(1) Meeting to introduce Ironwood's HR and Wellness teams	DeMayo & Ironwood
		a. Discuss current programs and initiatives	
		b. Review areas of opportunity and support	
		(2) Review / refine meeting schedule	

At that point, Ironwood would transition to the Planning Calendar and begin working on the next steps towards the renewal and open enrollment period.