

Who Should I Refer?

Think through your book of business. If one of these client situations sounds familiar, flag it. You do not need to diagnose the solution— we can explore the fit together.

The Painful Renewal



What you are seeing: Health costs are becoming unsustainable, choices keep narrowing, or the client is questioning whether benefits are still affordable

Think of the group whose next increase may force a difficult decision.

The Accidental HR Manager



What you are seeing: An owner, office manager, or operations leader is buried in HR, payroll, benefits, and compliance—with no specialist bench.

Think of the person who calls you with questions far beyond insurance.

The Growing Company



What you are seeing: Processes that worked with 10 employees are breaking at 30. Hiring, payroll, policies, benefits, and compliance are harder to manage

Think of the client growing faster than its back office.

The High-Maintenance Small Account



What you are seeing: A valuable client consumes disproportionate time with enrollment, employee questions, administration, or vendor coordination.

Think of the account you value—but cannot keep servicing this way.

The Talent Competitor

What you are seeing: The company is losing people to larger employers and needs stronger benefits, HR support, and professional infrastructure to compete.

Think of the client who says, “We cannot match what the bigger companies offer.”



A QUICK FIT CHECK

- Generally under 100 employees
- Offers—or wants to offer—group health benefits
- HR is handled part-time by an owner, office manager, or operations leader
- Payroll, benefits, HR, and workers’ comp involve separate vendors
- Growth or multi-state hiring is adding complexity
- Benefits cost or service issues are putting the relationship at risk
- Needs more support but is not ready to build a full internal HR team

LISTEN FOR THESE PHRASES

- “Our renewal increase is getting hard to absorb.”
- “Our office manager handles HR, but it isn’t really their job.”
- “We have outgrown the way we’ve always done things.”
- “Payroll, benefits, and HR are all in different places.”
- “We need better benefits to recruit and retain people.”
- “We cannot afford a full HR department.”
- “Changing payroll sounds like too much work.”



One client come to mind? Start there.

Bring Greg the situation, and we will determine together whether Helpside may be a fit.

1. Flag the client
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2. Talk to Greg
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3. Explore the fit together