



HEALTH AND WELFARE APPOINTMENT SETTING PROGRAM

Company:	Wheeling Metal Manufacturing	Website:	www.wheelingmetal.com
Prospect Name:	David Hall	Email:	dhall@wheelingmetal.com
Title:	President	Telephone:	304-555-1212
Address	123 Any Street	Alt-Phone #:	304-555-9999 (cell)
Address2:	Suite 525	Appt. Number:	123-1234
City	Wheeling	Client Name:	Frank Newage
State	WV	Produced By:	Amanda Karl
Zip	26003	Produced Date:	March 14th
County	Ohio	Appt. Date:	March 28th
Meeting Location	Same as above	Appt. Time:	10:00 AM

Information Provided By List Source

Type of Business:	Manufacturing	Sales Volume:	\$15,700,000
Year Established:	1995	Number of Employees:	130

Information Gathered by The PT Services Group

Eligible employees:	120
Participating employees:	100
Reason for low participation:	N/A
Their current broker:	Jones Insurance
Their relationship with their broker:	Good
Anything preventing them from changing brokers:	No
Area(s) they would like to focus on:	Better service, more options
Their Health Plan is currently through:	Blue Cross
They have been with them for:	4 years
Their renewal date:	July 1st
Their employees pay a portion:	Yes
Percentage:	30%
Benefit plans they currently offer:	Vision, Dental
Their role in the decision making process:	See Additional Comments
Can the owner be present:	No

Additional Comments:

You will be meeting with David Hall. David makes the final decision but relies on the recommendation of Mary O'Brien, Vice President of Human Resources. He will have Mary attend the meeting. He and Mary have been frustrated over the lack of a plan to control benefit costs. He said they just wait for the renewal and hope it's not too high. David believes there must be a better way to approach their benefits.