

FROM DISCOVERY TO FIRST PAYROLL

The full client process, start to finish.

An overview of the eight steps a business completes from initial call to live savings. Each step lists the average time expected to complete it.

**END-TO-END
TIMING**

Typical implementation runs **~4–6 weeks** from discovery call to first payroll savings.

STEP 1
DISCOVERY CALL

Business owner speaks to IronGate strategic advisors to go over the program.

20 MINUTES

STEP 2
SUBMIT PAYROLL DATA

Business submits requested payroll information.

1–2 WEEKS

STEP 3
REVIEW PROPOSAL

Business owner reviews savings and employee eligibility.

4–5 DAYS

STEP 4
SIGN ENGAGEMENT LETTER

Business owner receives and signs the service agreement.

1–2 DAYS

STEP 5
SIGN CARRIER PAPERWORK

Business owner receives and signs insurance documents.

1–2 DAYS

STEP 6
FILL OUT CENSUS

Business provides additional employee information.

3–5 DAYS

STEP 7
**SCHEDULE ONBOARDING
TOWNHALL**

Onboarding Q&A for the business's employees, hosted by IronGate (30 minutes).

2–4 DAYS

STEP 8
**REALIZE SAVINGS, VERY NEXT
PAYROLL**

The plan is live for the employer and employees, savings are generated each payroll cycle, and benefits are active and accessible.

7–14 DAYS