

This flow chart provides a clear overview of the full client process from start to finish. It outlines each step in the order it occurs and includes the average time expected to complete each stage.

STEP 1

DISCOVERY CALL

Business owner speaks to IronGate account executives to go over the program.

ESTIMATED TIME FRAME 30 MINUTES

STEP 2

SUBMIT PAYROLL DATA

Business submits requested payroll information.

ESTIMATED TIME FRAME 1-2 WEEKS

STEP 3

REVIEW PROPOSAL

Business owner reviews savings and employee eligibility.

ESTIMATED TIME FRAME 4-5 DAYS

STEP 4

SIGN ENGAGEMENT LETTER

Business owner receives and signs service agreement

ESTIMATED TIME FRAME 1-2 DAYS

STEP 5

SIGN CARRIER PAPERWORK

Business owner receives and signs insurance documents.

ESTIMATED TIME FRAME 1-2 DAYS

STEP 6

FILL OUT CENSUS

Business provides additional employee information.

ESTIMATED TIME FRAME 3-5 DAYS

STEP 7

SCHEDULE ONBOARDING TOWNHALL

Onboarding Q+A for the businesses employees hosted by IronGate. (30 minutes)

ESTIMATED TIME FRAME 2-4 DAYS

STEP 8

REALIZE SAVINGS VERY NEXT PAYROLL

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

ESTIMATED TIME FRAME 7-14 DAYS