

Benefits and Compensation Planners

The following three planners are based on benefits and compensation programs that are more or less common to companies in the U.S. Add and delete benefits and compensation programs to fit your purposes. Also, you may want to add more rows and columns, such as separate rows for Company A, Company B and Subsidiary C under Medical. Microsoft Excel works well for documents that will continue to grow over time.

Meeting discussion log

	Current benefit	Interim benefit	Future benefit	Open issues
Employees				
Medical				
Dental				
Vision				
Life insurance				
Accidental Death & Dismemberment				
Dependent Life insurance				
Disability				
Health Care Spending Account				
Dependent Care Spending Account				
Employee Assistance Program				
Prescription drugs				
Savings plan or 401(k)				
Vacation buying				
Legal services				
Adoption assistance				
Long-term care				
Financial planning				
Employee Stock Ownership Plan				
Severance				
Pension or cash balance plan				

Stock options				
Variable compensation				
Bonus programs				
New Hires				
(benefits that vary from the above)				
Retirees				
Medical				
Pension				
Life insurance				
Savings plan or 401(k)				
Survivors				
Medical				
Life insurance				
Savings plan or 401(k)				

Communications planner

	Topics	Media to use	Staff assigned	Delivery date
Employees				
Medical				
Dental				
Vision				
Life insurance				
Accidental Death & Dismemberment				
Dependent Life insurance				
Disability				
Health Care Spending Account				
Dependent Care Spending Account				
Employee Assistance Program				
Prescription drugs				
Savings plan or 401(k)				
Vacation buying				
Legal services				
Adoption assistance				
Long-term care				
Financial planning				
Employee Stock Ownership Plan				
Severance				
Pension or cash balance plan				
Stock options				
Variable compensation				
Bonus programs				
New Hires				

(list benefits that will be different from the above employee benefits)				
Retirees				
Medical				
Pension				
Life insurance				
Savings plan or 401(k)				
Survivors				
Medical				
Life insurance				
Savings plan or 401(k)				

Combined discussion and communications planner

	Benefits & Compensation			Communications			
	Current benefit	Interim benefit	Future benefit	Topics	Media to use	Staff assigned	Delivery date
Employees							
Medical							
Dental							
Vision							
Life insurance							
Accidental Death & Dismemberment							
Dependent Life insurance							
Disability							
Health Care Spending Account							
Dependent Care Spending Account							
Employee Assistance Program							
Prescription drugs							
Savings plan or 401(k)							
Vacation buying							
Legal services							
Adoption assistance							
Long-term care							
Financial planning							
Employee Stock Ownership Plan							
Severance							
Pension or cash							

balance plan							
Stock options							
Variable compensation							
Bonus programs							
New Hires							
(benefits that vary from the above)							
Retirees							
Medical							
Pension							
Life insurance							
Savings plan or 401(k)							
Survivors							
Medical							
Life insurance							
Savings plan or 401(k)							