

Introducing Forma's Benefits Value Assessment

Get help assessing your employee benefits programs and determining cost-effective solutions that add value. Forma's team of benefits experts will provide complimentary consultation services to help you refine your program and stretch your budget further.

Ultimately, the Benefits Value Assessment will give you a custom blueprint for improving the value of your benefits program and helping you do more with less.

Our three-step process

1. Data collection

You'll start by completing Forma's [2024 benefits survey](#) and sharing information about your current benefits program with us, such as:

- + Annual enrollment guide
- + Benefits spending/program
- + Utilization data*

2. Program analysis

Our benefits experts will examine your survey responses and plan details. Using Forma's proprietary [Business Value Assessment Calculator](#), we'll assess the efficacy of the existing programs to identify inefficiencies or gaps and map out recommendations for enhancements.

3. Flexible benefits workshop

We'll meet to review the analysis, validate assumptions, and refine the plan. Together, we'll build alignment and create a roadmap for an enhanced future state of your benefits program.

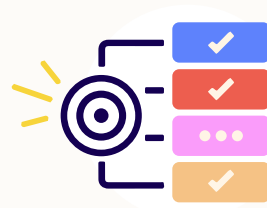
Key outcomes



A flexible benefits benchmark report with insights into the state of benefits industry



A competitive analysis of your program with recommended improvements



A data-informed strategy for building a cost-effective, flexible benefits program that demonstrates ROI

Deliver ROI with a flexible approach to benefits

You'll receive a personalized toolkit, including a refined strategy and data analysis. With this information, you'll have the tools to design and scale a flexible benefits program that helps:

- + Offer a cost-effective and comprehensive benefits package.
- + Eliminate countless hours (and headaches) managing multiple vendors.
- + Give employees choices and the support they need.

Realize the value of flexible benefits

At Forma, we specialize in flexible benefits programs that allow companies like yours offer a variety of benefits while maintaining cost-effectiveness and simplicity.

Our approach has helped our clients:

Save costs

affirm

saved \$500k in
6 months by removing
Concur

Improve utilization

stripe

95% of Stripes used
funds year 1

Drive efficiency

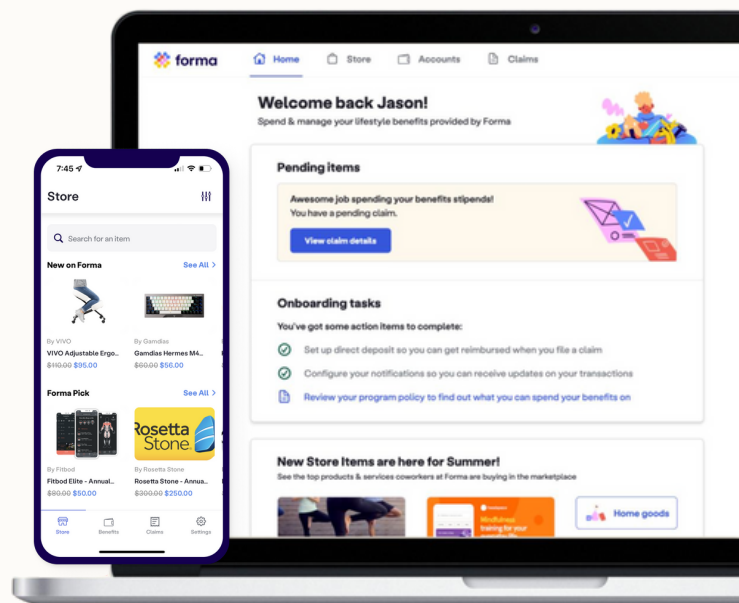
instacart

saved HR 80% time
reviewing receipts

Add value

zoom

employees rated
Forma's Lifestyle
Spending Account #1



About Forma

Forma's flexible benefits software helps companies offer competitive benefits packages while reducing costs and inefficiencies, by giving choices in how employees spend their benefit allowances. Using Forma, select Lifestyle Spending Accounts, Health Spending Accounts, Health Reimbursement Arrangements, and Flexible Spending Accounts to customize your program. Employees have three choices to spend funds: The Forma Store with discounted products/services, The Forma Visa Card, or claim reimbursement backed by Forma's world-class member support team.