

PEO Questionnaire

This profile is designed to show businesses and referral partners exactly where your PEO shines. It's your chance to highlight your strengths, what sets you apart, and any creative offers or guarantees that may encourage them to learn more. Short, specific answers work best.

Company Name: _____ Year Established: _____

Headquarters (City, State): _____

Mission Statement (<300 characters including spaces):

Certifications (ESAC, CPEO, etc.): _____

What Sets You Apart? (<500 characters including spaces):

What businesses do you serve best? (Industries, business types, growth stage, complexity)

What's your ideal employee size range? (Where you consistently deliver the most value)

- 10-25
- 25-50
- 50-100
- 100-300
- 300+

Optional notes:

Who Are You Not a Great Fit For? (Be specific here)

What Are You Especially Great At?

(Here are a few examples of core strengths, or add others in the details section)

- Hands-on HR support
- Workers' comp structure and savings
- Benefit options and or strategy
- Multi-state payroll and compliance
- Industry specialization
- Service model / client experience

Details:

What Often Surprises Clients After They've Been Working with You? *(Service level, access, support, etc.)*

Special Offers: Please check up to 3 incentives you'd like displayed:

- Cybersecurity & Identity Theft Training – Protect employees and the business from cyber risks
- EPL insurance up to \$250 – Offset costs to guard against employment-related claims
- Free Employee Handbook (\$300 value) – Professionally prepared, compliance-focused guide
- Free 401(k) transfer – Seamless plan migration at no extra cost
- No annual 401(k) fee – Eliminate ongoing administration charges
- Drug & background tests (\$300 value each) – Hire confidently and reduce risk
- 20 E-Verify services (\$300 value) – Fast, compliant employment eligibility checks
- Safety or compliance briefings – Keep teams current and reduce incidents
- Technology access upgrades – Enhanced HR/payroll tools for better efficiency

Satisfaction & Performance Guarantees (choose up to 3):

- 60-Day Guarantee – Cancel within the first 60 days for a full admin-fee refund
- Service Response Guarantee – Responses within 1 business day, or the next pay period's admin fee is reduced/waived
- Accuracy Guarantee – Payroll processed 100% accurately or penalties/fees are covered
- Rate-Lock Guarantee – Your approved payroll rates stay fixed for 12 months
- Service Commitment Guarantee – Weekly calls for the first 30 days to ensure smooth onboarding, or we extend at no cost

Please include other ideas below that may fit your PEO:

**Please attach your logo (PNG or SVG preferred; 800px minimum width) and email this form back to Jennifer@PEOMarketplace.com.

By completing your profile and providing your logo, you authorize us to create and display a dedicated page for your PEO within our online PEO directory. Any additional use of your information or logo such as marketing or cross-promotional materials, including social media will only be used with your prior approval.

Signature

Date