

PEO EXECUTIVE DECISION SHEET

A one-page record of the evidence, decision and next action

Key date or fact	Response	Key date or fact	Response
Renewal date		Notice deadline	
Decision deadline		Implementation date	
Current headcount		Expected headcount	
States of operation		Material changes	

Seven-Factor Diagnostic

Factor	Strong	Mixed	Weak	Evidence
Strategic fit	☐	☐	☐	
Total economics	☐	☐	☐	
Benefits fit	☐	☐	☐	
Service and accountability	☐	☐	☐	
Technology and reporting	☐	☐	☐	
Risk and execution	☐	☐	☐	
Future readiness	☐	☐	☐	

Decision

☐ Stay ☐ Renegotiate and stay ☐ Switch PEOs ☐ Leave the PEO model

Field	Executive response
Decision basis	
Terms that must change	
Alternatives evaluated	
Risks that remain	
Decision owner	
Immediate next action and due date	

Final test: Would we defend this decision to employees, the board and a buyer using the same evidence?