

# PlanSource is Partner-Friendly



## We are your supplier

At PlanSource, we think of ourselves as the arms dealer to the insurance broker community. With a complete portfolio of benefits administration, insurance exchanges and human capital management tools, PlanSource will help you grow your business and keep your customers happy with experienced services teams who will work with you to acquire new customers, sell new lines of business into your existing customers, and minimize churn. Simply said, our job is to help you win.

## We are on your side

We do not compete against brokers or sell direct to employers. Our team loves partnering and working with brokers, and that has always been our model. In fact, our Platform is designed with you - the partner - in mind. We give you the ability to quickly and easily access all of your customers in one convenient place. In addition, you can take advantage of consolidated reporting and metrics that give you meaningful insights across your entire book of business.

## We are your partner

We understand that different partners service their customers differently. As a result, we've structured our business accordingly to better work with you. As a partner with PlanSource, you can work with us in one of two distinct service models: OutSource or CoSource. The type of relationship depends on your comfort level with technology, your approach to your business and customers, and the type of working relationship you wish to have with your customers.

## The Benefits of Being a PlanSource Partner

- ↑  
Higher voluntary  
employee participation
- ↑  
Higher productivity  
in your agency
- ↑  
Higher customer  
retention
- ↑  
Higher  
win rates
- ↑  
Higher revenue  
per case

## PlanSource works with insurance brokers in two ways:

### OutSource Relationship

*So if you tend to be...*

- 1 Limited in technology expertise and resources
- 2 Constrained by resources and capacity
- 3 Focused more on "the business" vs. "the technology"
- 4 Prioritizing other areas of your business ahead of technology

*Then here is the "who does what":*

|                                  | PlanSource | Partner |
|----------------------------------|------------|---------|
| Customer Relationship Management |            | ☑       |
| Setup and Implementation         | ☑          |         |
| Ongoing Support                  | ☑          |         |
| Eligibility Data Management      | ☑          |         |
| Premium Billing                  | ☑          |         |
| Data Exchanges with 3rd Parties  | ☑          |         |

Learn more at [www.plansource.com/outsourcing](http://www.plansource.com/outsourcing)

### CoSource Relationship

*So if you tend to be...*

- 1 Staffed with tech-savvy team members
- 2 Ready to make an investment with resources and capacity
- 3 Using technology as an integral piece of your strategy
- 4 Focused on developing strategic relationships with clients

*Then here is the "who does what":*

|                                  | PlanSource | Partner |
|----------------------------------|------------|---------|
| Customer Relationship Management | ☑          | ☑       |
| Setup and Implementation         |            | ☑       |
| Ongoing Support                  |            | ☑       |
| Eligibility Data Management      |            | ☑       |
| Premium Billing                  |            | ☑       |
| Data Exchanges with 3rd Parties  | ☑          |         |

Learn more at [www.plansource.com/cosourcing](http://www.plansource.com/cosourcing)



## The Elite Partner Program

PlanSource offers an Elite Partner Program that caters to the top performing insurance brokers and partners. For partners that generate and exceed certain business thresholds, PlanSource rewards their commitment with pricing and service benefits.

These benefits are designed specifically to help partners win and grow business. With discounted pricing and personalized services, PlanSource emphasizes building and maintaining a productive and efficient business relationship with its top producers.

### There are two ways to become an Elite Partner:

#### Contract It With PlanSource

Brokers who contractually commit to place a certain amount of business with PlanSource.

#### Earn It With PlanSource

Brokers who generate more than a certain amount of business with PlanSource.

### What you get as an Elite Partner:

- Quarterly "state of the partnership" meetings
- Marketing collateral that helps you sell new business
- Online resources that help your producers produce
- Designated team to help you sell new business
- Field sales support to wow your prospects
- Designated team to help manage existing business
- Discounts on products and services
- And much, much, much, much more!

Learn more at [www.plansource.com/brokers](http://www.plansource.com/brokers)