

# The PlanSource Reseller Roundtable



## About The PlanSource Advisory Boards

PlanSource is a customer-driven company. We understand that our future success depends on keeping our current customers happy. Maintaining a balance between growth and customer retention is a direct result of PlanSource staying current, compliant and relevant. One of the key approaches we take to achieving this understanding is listening to and having high quality conversations with our partners and customers through the PlanSource Advisory Boards.

By understanding our market from the point of view of our partners and customers, we stay relevant while balancing the needs of keeping existing customers happy and adding new customers to the PlanSource community.

## About The Elite Advisory Board

The PlanSource Reseller Roundtable is a group of PlanSource's closest and most-trusted partners who commit their own resources to support and advise customers on their day-to-day use of the PlanSource system. Since Reseller partners are staffed with tech-savvy people and view technology as an integral part of their value and a foundation for a more strategic relationship with their customers, PlanSource is invested in their success.

The Reseller Council is comprised of power users from the PlanSource partner community. PlanSource trains and keeps partners up-to-date and ensures they have what they need to represent PlanSource and "wow" their clients.

## Why You Should Participate

PlanSource Reseller Roundtable members will have:

- Influence on the development of product functionality to meet business needs
- Quality time with the PlanSource leadership team to ensure alignment
- Advanced knowledge of product changes and updates to the PlanSource solution and offering
- Opportunities to share and gain knowledge and experience from other Roundtable members
- Updated information on industry trends that shape the benefits and HR industries

## Why We Do This

The objectives of the Reseller Roundtable are to:

- Organize and focus partner recommendations to hone a best practice approach of servicing employers
- Stay up-to-date on the current needs of employers and what is shaping the HR profession
- Influence the direction of the PlanSource product road map to ensure a successful partnership
- Provide a forum in which collaboration among industry peers can occur
- Identify customer and industry best practices in benefits and HR

## How It Works

Here are the details of The Reseller Roundtable:

- It's a membership-only group of PlanSource Elite Reseller Partners who directly service customers
- Only employees and contractors of Elite Reseller Partners are eligible to join (although there is no limit)
- Membership terms coincide with the contract term of the brokers as long as partners are in good standing
- Meetings will be held three times per year, with one in-person and two remote meetings
- Meetings are pre-scheduled and well-organized to ensure that you get the most out of them