ECLIPSE

Introducing PlanSource Analytics

Hanna Jenkins, Product Director Anita Messal, Chief Operating Officer

Agenda

Introductions Product Overview Demo Looking Forward Q&A





Presenters







our organization currently leveraging analytics for better decision and/or identifying opportunities?

1927	We pull manual reports from multiple systems and manually crunch the data.
3551	We have a strategy and are making investments in analytical tools.
3701	Our analytics strategy is well-established and central to the overall business strategy.
3909	Not sure

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Product Overview

Hanna/Anita



The Value of Data Analytics



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Data is essential

PlanSource has valuable data

Data has become essential to decisionmaking and companies are rushing to mine as much as possible.

We have accumulated more than 50 million employee benefit elections for all types of benefits.

Collecting data is time consuming

Gaining a concise overview is time consuming with the growing volumes of data and data sources.



Dashboards are a solution

Dashboards offer a solution by condensing multiple reports into visuals for quick summaries and insights.



Analytics provide quick insights

Analytics provide rapid information to refine strategies, identify customer needs and recognize trends.

Introducing PlanSource Analytics

Analytical tools and on-demand dashboards built using data captured in the PlanSource system

Offering a wide range of benefits-related metrics and statistics to optimize business decisions and strategies for Brokers, Employers and Carriers



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Key Features



Ease of Use

Easy to use, self-service dashboards with visual and dynamic charts with drill-down capabilities

Core Metrics

On-demand access to core business metrics and Key Performance Indicators

Benchmarks

Advanced tools to strategically compare and contrast key metrics against peers, industry trends and benchmark statistics

Analytical Insights

Customized and condensed insights that present opportunities to make better faster decisions. Easily spot trends and analyze historical performance.

Product Launch Strategy

Tiered Approach

Initial Phase

- On-demand dashboards
- Core metrics and KPIs
- Benchmarks and comparisons
- Dynamic and visual charts
- Drill-down and custom filtering
- Detailed reports
- Export option
- Responsive design

Future Roadmap

- "What-if" modeling
- Custom insight statements
- Predictions and recommendations
- Import option
- 3rd party data sets
- API connection
- Custom branding

Benefits of PlanSource Data Analytics

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Overview -	Open Enrollment Summary Summary of enrollment performance and real-time status update	s on current enrollment activitie	5.				
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					Vol Life		



Enable better decisions



Identify new opportunities



Quick, easy access to insights



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Analytics for HR Executives





Jen

Thrive Hospitality

HR Administrator | 500+ Employees

Goals

- Offer the best benefit package tailored for her workforce
- Track employee engagement and benefit performance

Needs

- Flexible reporting options to quickly and easily access information to analyze benefit performance and engage employees.
- Ability to analyze a wide variety of plan details, across plan years to make informed, cost effective decisions for the company and maximize benefit investment.







Jake <u>Williams Agency</u> Account Executive | Elite Broker

Goals

- Help employers create more competitive and comprehensive benefits packages structured for their specific needs.
- Drive new sales, sell new lines of business into existing customers and minimize churn

Needs

- Quick access to data to better understand his customers and identify their needs
- Access to benchmarks and metrics to discover new areas of opportunity and distribution within the existing book of business

Analytics for Carrier Partners





Keri

Pacific Sun Insurance

Relationship Manager| PlanSource Advantage Partner

Goals

- Drive growth through benefits technology platforms
- Develop differentiated offerings and strategies to drive participation with their products

Needs

- Ability to gather key metrics and insights about her customers, products and overall business performance on the PlanSource platform
- Insights to determine if current programs and strategies are effective

Looking Forward

Future Roadmap





Analytics Roadmap

- Decision support and shopping
- Employee preference and satisfaction
- Human Capital Management (HCM)
- Pipeline and financial performance
- Embedded workflow

How will PlanSource Analytics help you and your organization?

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Enable better-decision maki based on accessible and objecti da	0
Identify new opportunities a develop new strateg	
Create smarter benefit plan desig	ns 281150
Reduce the time and effort collecting and analyzing da	0011
Note Su	re 281189
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What activities do you report on the most? How will PlanSource Dashboard help?



What metrics/benchmarks are of interest to you?



How are you currently collecting and analyzing data?





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