

Our Values

We live our values and are committed to your long-term success.

Operational Integrity

We deliver for you

Customer Intimacy

We listen to you

Business Growth

We empower you

Corporate Citizenship

We partner with you

PLANSOURCE®

The Customer Experience

Our Approach

We deliver the right way to ensure your security and profitable growth.

Compliance and Ethics

We do the right thing

Quality/Standards

We get it done right

Product Management

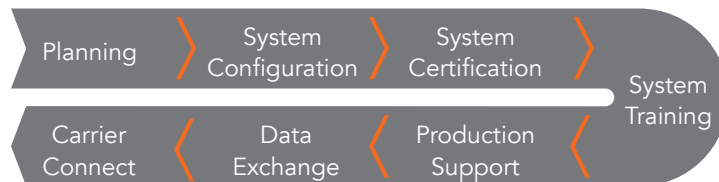
We build it right

Security/Continuity

We keep it working

Setup It's fast, easy and scalable - no matter how big or small.

How We Do It



Who Will Do It



Project Manager

Ensures the project gets done according to plan



Configuration Specialist

Sets up the system per your requirements



Data Analyst

Delivers smoothly working integrations

Support We're here to help you - if you're a broker, employer or insurance carrier.

How To Reach Us



Phone

Talk to a real-live person
8am-8pm EST, Mon-Fri
at (877) 579-8549.



Email

Email us at service@plansource.com and we'll respond within 24 hours.



Webinars

Get instruction and help with live assistance at plansource.com/training.

How It Works

Tier 1: Service Issues

As the first line of response, we'll help with "how to" questions and data integrity issues.

Tier 2: Broker Questions

We'll help with best practices and issues requiring additional research.

Tier 3: Project Inquiries

We'll help with account level topics such as open enrollment and renewal processes.

Integration Leverage the PlanSource ecosystem for core and voluntary benefits.



Benefits & Retirement



Talent Management



Payroll & Taxes



Workforce Management



Advocacy Just because you're live and issue-free doesn't mean we're done.

Resources



Relevant User Training

From webinars to events and trends to tips & tricks, we'll keep you up to speed on what you need to know.



Proactive Customer Surveys

Be honest - if you had a great experience we'd love to hear; if otherwise, we'd love to hear about it even more.



Gather Feedback

Feedback is a gift - we want to know how the product is working for you and what problems we need to solve next.



Pre-Release Communications

Change is tough - that's why we'll give you plenty of advance notice when we change stuff or add new bells & whistles.



Channel Manager

To provide management oversight, channel managers maintain senior-level relationships.



Account Manager

To ensure quality service, you'll have a single point of contact to ensure your success.

Our Results The proof is in the numbers.



150+

customers w/ 1,000+ employees



42 Day Avg

implementation cycle
(Ben Admin only)



+67 NPS

vs industry standard of 26



40%

implemented by 3rd parties



12,000+

data exchange connections



<1%

staff turnover rate (monthly)



50 states

of covered payroll

Roll-Out Strategies

We support different approaches to take you and your employees live.



Active

With employee and dependent data loaded into PlanSource, open enrollment is conducted with no prior coverages.



Passive

With employee and dependent data loaded into PlanSource, open enrollment is conducted with prior coverages, including voluntary plans with guaranteed issue amounts.



Ongoing

Typically a mid-year conversion with all employee, dependent and all coverage data loaded into PlanSource prior to go-live.

What We'll Need

- ☐ Carrier Acknowledgment Form
- ☐ Payroll Information
- ☐ Rates & Contributions
- ☐ Business Rules
- ☐ Plan Documents
- ☐ Key Contacts
- ☐ Broker/Client

How We Do It

- Planning** Success starts with a clear plan of who owns what and when it will be done.
- System Configuration** PlanSource will turn the dials so that the system is set for you.
- System Certification** PlanSource will test, fix and test again until its right.
- System Training** Users need hands-on training before going live.
- Post-Production Support** Going live is just the start, and when you need the most help.
- Data Exchange** PlanSource will plan, configure and deploy connections to carriers.
- Carrier Connect** PlanSource will bridge the gap until data exchange is live.

8-Week Implementation Plan

Month #1

Week 1 |

Week 2 |

Week 3 |

Month #2

Week 4 |

Week 5 |

Week 6 |

Week 7 |

Week 8 |

Planning

System Configuration

System Certification

System Training

PlanSource
Go Live

Data Exchange
Go Live

Post-Production
Support

Data Exchange

Carrier
Connect