

Real-Life Benefits Technology Success Stories



SHRM
SHRM-CP | SHRM-SCP
RECERTIFICATION
PROVIDER
2020

JULY 16, 2020

WILL THE WEBINAR BE RECORDED?

Yes!

We will send you a link to the recording after the webinar.

WILL THE SLIDES BE AVAILABLE?

Yes!

We will send you a link to the PDF after the webinar.

WILL WE GET **HRCI** AND **SHRM** CREDITS?

Yes!

You will receive the codes at the end of the webinar and in follow up emails.

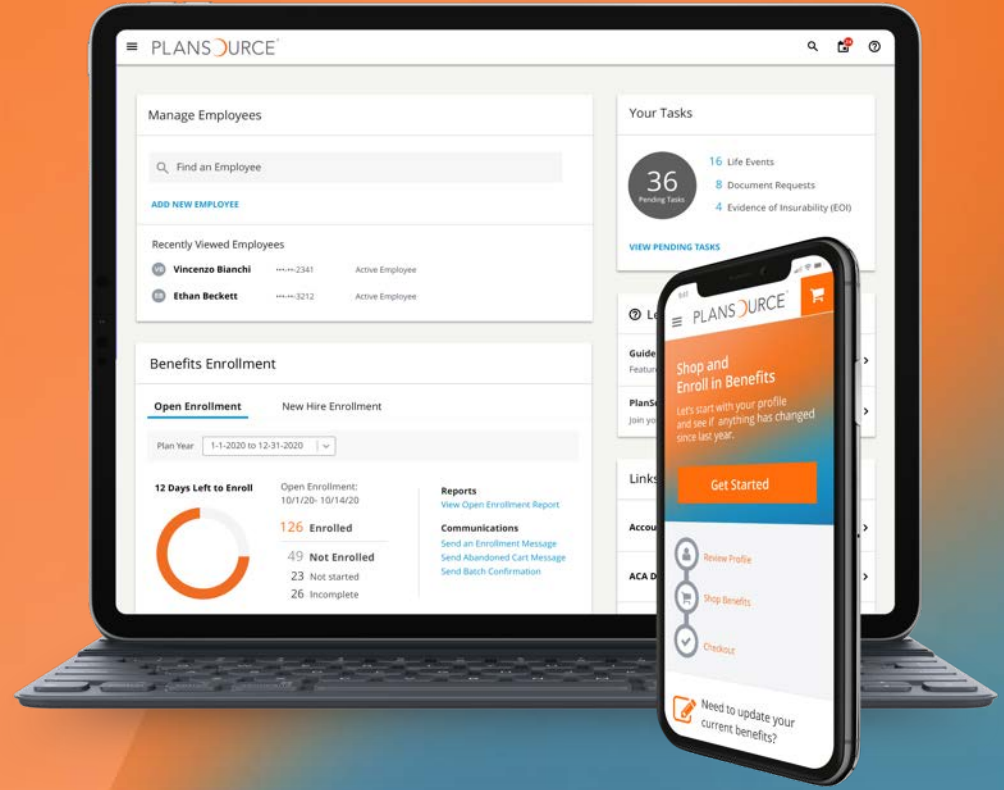
HOW DO YOU ASK QUESTIONS?

Type your question into the
"Questions" panel

PlanSource

Better Technology for a Better Benefits Experience

Flexible and intuitive benefits
shopping, enrollment, billing,
compliance and administration



Today's Amazing Speakers



Andrea Evanter
SVP, Human Capital
The CORE Group



Tammy Valle
Director, HR Operations
Meruelo Group



Christy Guilbault
Benefits Solutions Senior Manager
Entertainment Partners



INTRODUCING

Andrea Evanter
SVP, Human Capital
The CORE Group



INTRODUCING

Tammy Valle

Director, HR Operations
Meruelo Group





INTRODUCING

Christy Guilbault

Benefits Solutions
Senior Manager
Entertainment Partners



THREE CA-BASED COMPANIES WITH UNIQUE CHALLENGES



THE CORE GROUP

Chino, California

600+ employees

54 offices in all 50 states

Foodservice sales

PlanSource customer
since 2012



MERUELO GROUP

Downey, California

6,000+ employees

21 portfolio companies

Strategic consulting for
hospitality, construction and
other industries

PlanSource customer
since 2012



ENTERTAINMENT PARTNERS

Burbank, California

12,000+ employees

High-turnover employee
population in 49 states

Entertainment industry

PlanSource customer
since 2013

THE CORE GROUP STORY | ANDREA EVANTER

TOP CHALLENGES

FAST-GROWING
company in multiple states

70%
of employees located in the field

PAPER-BASED
processes / too much admin effort

Employees
**LACKED AN
UNDERSTANDING**
of their benefits

THE PLANSOURCE SOLUTION

AUTOMATE
manual processes

INTEGRATES
with our HR system

MOBILE
friendly benefits

VIDEO LIBRARY
for employees

RESULTS

50% of employees completed open enrollment
in the first **2 DAYS** (used custom video from PlanSource)
Employees get **ANSWERS** on their own Instead of calling HR

**REDUCTION IN
ADMIN EFFORT**

2
hours per
new hire

30
minutes per life
event change

5
hours per
employee annually

WEEKS
of time savings
at OE!

MERUELO GROUP | TAMMY VALLE

CURRENT STATE IN EARLY 2020

PlanSource capabilities
**WEREN'T FULLY
UTILIZED**

HR WAS CONSUMED
by tasks that could have
easily been automated

**OPPORTUNITIES
TO SAVE MONEY
WERE MISSED**

20+ ACQUISITIONS
over the years

WHAT WE CHANGED

Enabled employee **SELF-SERVICE AND
AUTOMATED COMMUNICATIONS**

Leveraged customizable reporting to illuminate
opportunities for **COST SAVINGS**

Leaned on PlanSource account management team to
ASSIST WITH COVID challenges

RESULTS

Automation and employee communications **SAVES
25%** of HR team's time

Improved reporting has **LOWERED COSTS**

Furloughed thousands of employees with
ASSISTANCE from PlanSource

ENTERTAINMENT PARTNERS | CHRISTY GUILBAULT

TOP CHALLENGES

Employees across 49 states
**BOUNCE FROM STUDIO
TO STUDIO**

**EMPLOYEES DIDN'T
UNDERSTAND**

their options for benefits

Complicated benefits and eligibility
**RULES THAT VARY
BY STUDIO/GROUP**

THE PLANSOURCE SOLUTION

Flexible defined contribution and
RULES BY POPULATION

MOBILE-friendly solution for employees

Email and **TEXT MESSAGING**

RESULTS

**INCREASED EMPLOYEE
UNDERSTANDING**

of their benefits

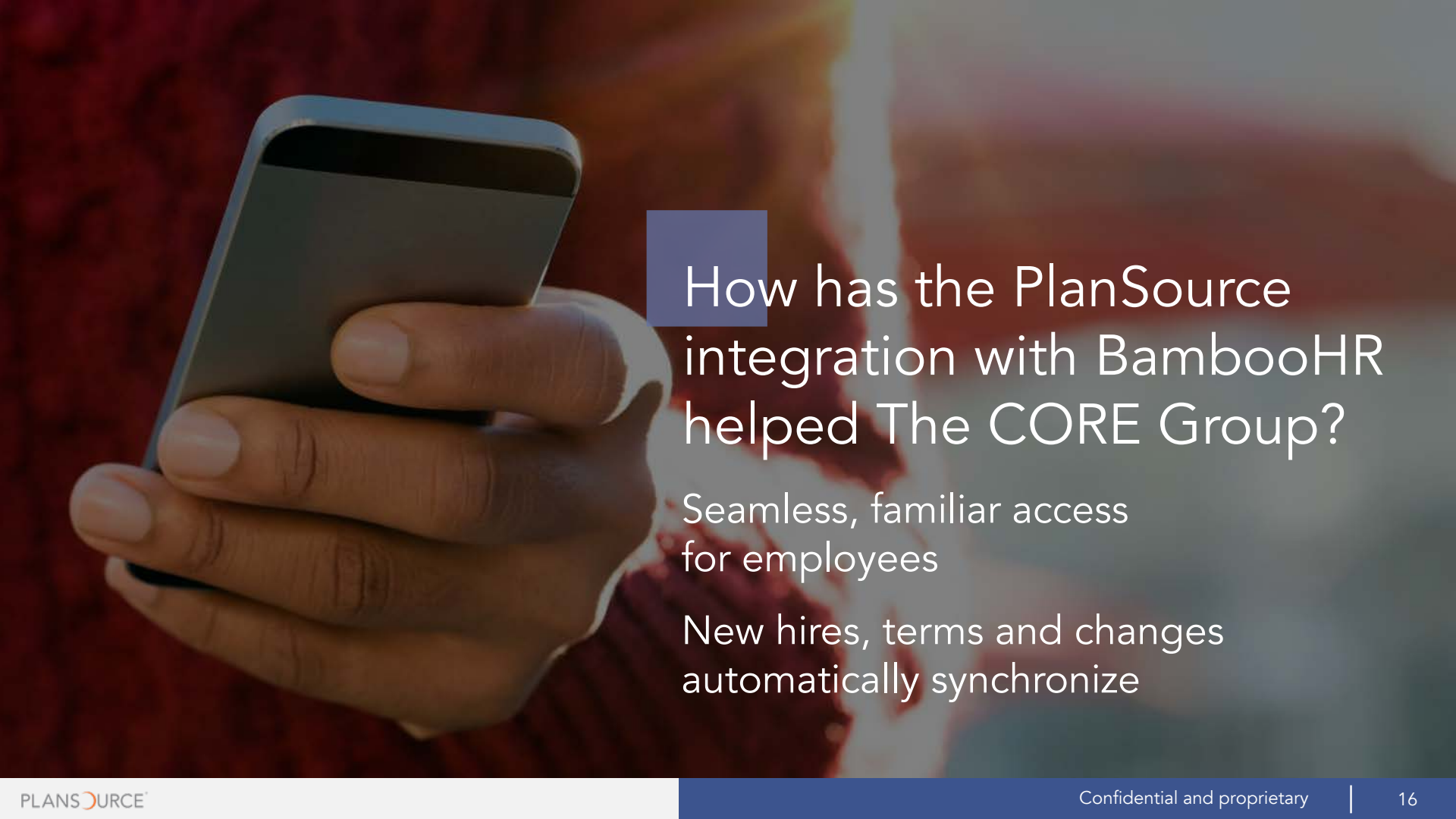
REDUCTION IN ADMIN EFFORT



When COVID-19 brought new challenges to Entertainment Partners, how did you use PlanSource to respond?

Custom fields for tracking COVID-19 status

Configurable reports to provide visibility into employee status



How has the PlanSource integration with BambooHR helped The CORE Group?

Seamless, familiar access for employees

New hires, terms and changes automatically synchronize



What kind of support
does Meruelo Group
receive from your
PlanSource Account
Manager?



How does defined contribution work for Entertainment Partners, and how does PlanSource help you manage it?

A scenic landscape featuring a stone path that winds through a lush green field. In the background, there are rolling hills and mountains, some of which are shrouded in mist or low clouds. The sky is overcast, and the overall atmosphere is serene and natural.

What has PlanSource done
to evolve and keep up
with The CORE Group's
needs as you have grown?

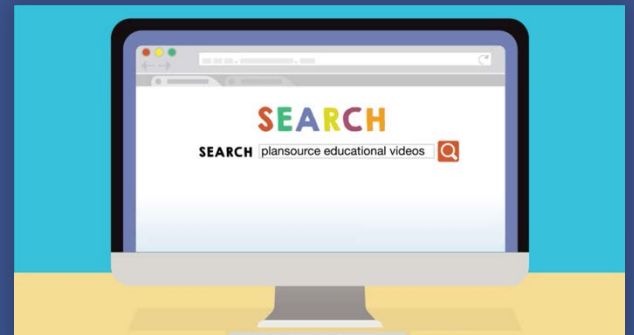


How did PlanSource help Meruelo Group manage its Medicare-eligible population?

VIDEO LIBRARY

How does Entertainment Partners use the PlanSource video library to educate employees?

What is the PlanSource Video Library?





Q&A

SHRM & HRCI CODES

HRCI: XXXXXXXX

SHRM: XXXXXXXX