

PLANSOURCE CUSTOMER SATISFACTION ASSURANCE PROGRAM

FOR CUSTOMERS OF ALLIANT, AON, GALLAGHER, LOCKTON AND WILLIS TOWERS WATSON

Customer Success Packages

Existing and new Alliant, Aon, Gallagher, Lockton or Willis Towers Watson accounts with \$25k in annual fees now qualify for the Complete Customer Success Package, which means that a Technical Support Manager will be assigned.

	ESSENTIALS	COMPLETE	VIP
	Best for small-mid-sized customers with straightforward benefits and low complexity	Ideal for medium-large customers that have more complex benefit needs and/or add-on services	Designed for large, complex customers that need a full team to provide a tailored, high-touch approach
PlanSource University	●	●	●
Community Forum	●	●	●
Idea Portal	●	●	●
Known Issue Tracker	●	●	●
Online Knowledgebase	●	●	●
Technical Support	Shared team	Designated Technical Support Manager	Designated Technical Support Manager
Benefit Configuration Support	Shared team	Designated Benefits Business Analyst as Needed	Designated Benefits Business Analyst as Needed
Integrations/EDI Support	Shared team	Designated Data Analyst as Needed	Designated Data Analyst as Needed
Annual Benefit Renewal and OE Planning	Online Guided Renewal Experience with Support as Needed	Project Planning and Configuration for Annual Benefits Events	Project Planning, Consultation and Configuration for annual Benefits Events
Proactive Consultation and Planning			Designated Customer Success Manager
Leadership Access	Defined Feedback Path to Management	Defined Feedback Path to Management	Designated Executive Sponsor
Annual Fees (Standard)	None	\$50K	\$100K
Annual Fees (Alliant, Aon, Gallagher, Lockton, Willis Towers Watson)	None	\$25K	\$100K

The objective of the Customer Satisfaction Assurance Program is to make it easy for you to bring your customers to PlanSource with confidence. In addition to our modern and mobile-friendly technology platform, your customers will benefit from zero implementation fees, additional launch support, a service level agreement and a formal 1-year performance review.

The details: How it works



ACCOUNTABILITY

No implementation fee, and if PlanSource doesn't receive at least 4 out of 5 stars on our post-launch survey, we'll provide a 1-month PEPM credit



ADDITIONAL LAUNCH SUPPORT

We'll provide visibility into key milestones and pay your team to ride along and support the Launch team

- \$2,500 for 750-2,500 EEs
- \$5,000 for 2,501-5,000 EEs
- \$10,000 for 5,000+ EEs



SERVICE LEVEL AGREEMENT

PlanSource will sign up for a contractual SLA including a formal 1-year performance review with ability to terminate after 12 months

Applies to customers with **750+ employees** and contracted in Q4.

A **4-year contract** with at least 1 Boost partner is required.

PEPM billing starts at **contract** signing.

Example: New Customer

with 1,000 Employees | Referred and Signed June 2021

STANDARD

Payment to broker for support of Launch: \$0

Implementation fee of \$6,600

(25% of annual software subscription:
1,000 employees x \$2.20 discounted
PEPM x 12 months x 25%)

3-Star post-implementation survey score
(ok, but room for improvement): No credit

Service Level Agreement may or may not
have been requested during sales process

Designated Technical Support

Manager not included (needs to be
\$50K+ in annual fees to qualify)

**No ability to term prior to end of
contract** regardless of satisfaction with service

CUSTOMER SATISFACTION ASSURANCE PROGRAM

Payment to broker for support
of Launch: \$2,500

Implementation Fee: \$0

3-Star post-implementation survey score
results in 1-month PEPM credit (\$2,750)

Service Level Agreement included to
reduce risk and increase confidence

Designated Technical Support

Manager now available to this customer
(because annual fees are greater than \$25K)

**Customer can term contract after
12 months** if not satisfied after a
1-year performance review