

# PLANSOURCE CUSTOMER SATISFACTION ASSURANCE PROGRAM FOR LOCKTON CUSTOMERS

## Customer Success Packages

Existing and new Lockton 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
<b>Annual Fees (Standard)</b>	<b>None</b>	<b>\$50K</b>	<b>\$100K</b>
<b>Annual Fees (Lockton)</b>	<b>None</b>	<b>\$25K</b>	<b>\$100K</b>

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 Lockton 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