

PLANSOURCE



Secrets to a Successful Benefits Technology Implementation

JUNE 30, 2021



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.



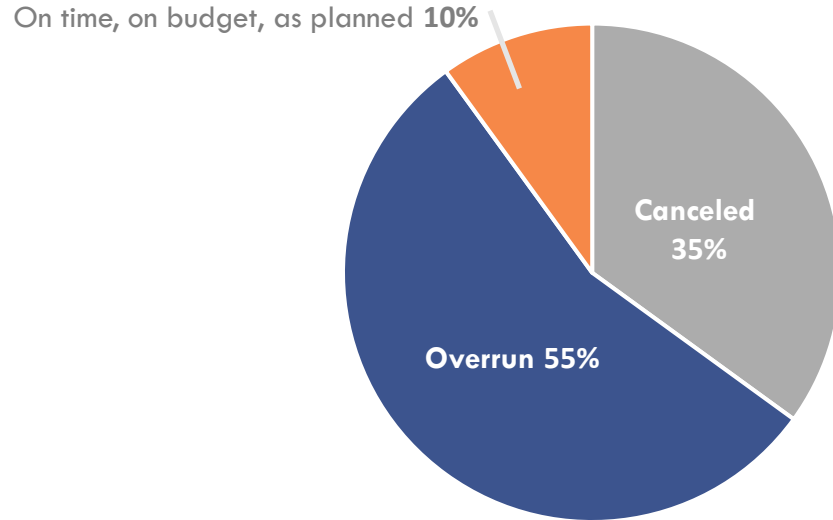
HOW DO YOU ASK QUESTIONS?

Type your question into the
"Questions" panel

ENTERPRISE TECHNOLOGY PROJECTS

Technology implementations are hard, and most don't achieve the desired result!

TECHNOLOGY PROJECT RESULTS



TOP REASONS PROJECTS FAIL

Lack of governance

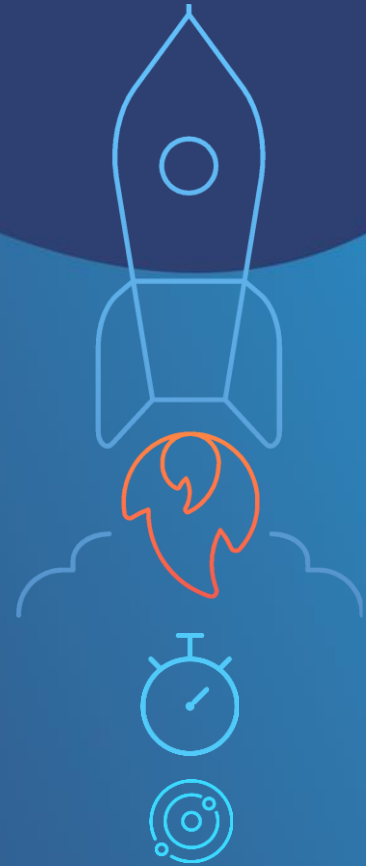
Lack of testing

No true focus on training & knowledge transfer

Lack of change management

That's why you need an experienced tech partner with a proven launch methodology!

IT TAKES A PARTNERSHIP TO BE SUCCESSFUL!



AGENDA

Implementation Methodology & Best Practices

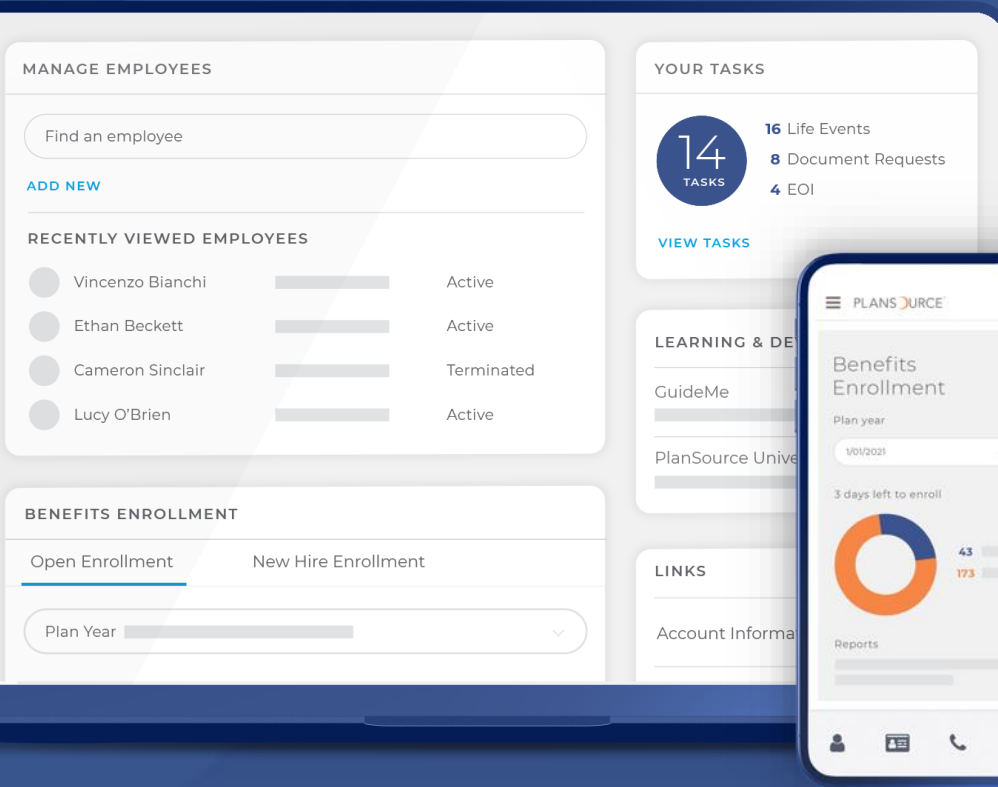
Guest Speaker Intros

Case Studies

Implementation FAQs

Q&A












PLANSOURCE








Spend less time
managing employee
benefits

Automate and simplify every
aspect of your benefits program with
PlanSource

PlanSource Benefits Software

-  Benefits Software
-  Communications
-  Shopping
-  Enrollment
-  Billing
-  Compliance
-  Administration

PlanSource Benefits Services

- PREMIUM BUNDLE
-  Benefits Outsourcing
 -  Employee Contact Center
 -  Billing Reconciliation and Payment
 -  COBRA Administration
 -  HSA / FSA / HRA Administration
 -  Dependent Verification
 -  Employee Communications

LAUNCH *Journey*



LAUNCH Journey



BRIEFING: Welcome to the PlanSource family! In our initial Launch Briefing, we'll discuss expectations, timelines and next steps to ensure a smooth and successful launch.

LAUNCH *Journey*



COUNTDOWN: In this phase, you'll start learning the system, and we'll gather all the info we need about your benefits to prepare for Lift-Off.

IMPORTANCE OF THE COUNTDOWN PHASE

PREPARATION IS THE FIRST STEP TOWARD A SUCCESSFUL BENEFITS LAUNCH!

The Transition Specialist steps in as soon as the contract has been signed and works with you to gather the required benefit documents.

The Transition Specialist will also hold a Launch Briefing (different from the Lift-Off Call) where they will go over the next steps of the Launch process and ensure you have access to training tools to get you ready.



YOUR TRANSITION SPECIALIST

Prepares you for the Launch Journey and provides initial training resources

Holds Launch Briefing and Completes Workbook

Follows up with you to make sure you stay on track

Approves you for Lift-Off and transition to the Launch team

LAUNCH Journey



LIFT-OFF: Blastoff! Your Project Manager will conduct a kickoff meeting and lead a discovery where we'll discuss your requirements and agree on your launch style and timeline.

LAUNCH Journey



STAGING : Here, you'll travel through three stages before signing off on the system: **Requirements, Configuration, and Audit & Testing.**

LAUNCH Journey



REQUIREMENTS: First, we'll work with your team to understand and document all of your unique business requirements, workforce configuration and eligibility rules in detail.

LAUNCH Journey



CONFIGURATION: Next, a Configuration Specialist will do all the heavy lifting setting up your system, before handing off to your Benefit Coach for a comprehensive inspection.

LAUNCH *Journey*



AUDIT & TESTING: Finally, your team will be able to walk through the entire system using test employee data to make sure everything is exactly how you want it.

LAUNCH *Journey*



GO - LIVE : All systems go(live)! Your PlanSource system is now enabled and ready for open enrollment or for employees to make mid-year changes.

LAUNCH *Journey*



ORBIT: Now you're live, your team is trained, and your data is syncing with your insurance carriers and other partners.

PROJECT GOVERNANCE

An effective governance program is essential to keeping your project on-track

EXECUTIVE OVERSIGHT

PlanSource
Executive Sponsor

Your Organization
Executive Sponsor

PROJECT MANAGEMENT TEAM

PlanSource
Project Manager

Your Organization
Project Manager

PLANSOURCE DELIVERY TEAM

Transition Specialist

Configuration Analyst

Benefits Coach

EDI Analyst

YOUR ORGANIZATION'S TEAM

HR Leaders

Benefit Experts

HR Decision Makers

Information Technology

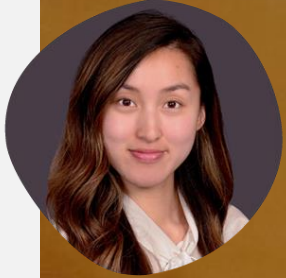
Today's Guest Contributors



Kaylie Zhang
Benefits Analyst
Clearway Energy



Shelley Dusek
Director of Human Resources,
Labor Relations
City of Kalamazoo



INTRODUCING

Kaylie Zhang

Benefits Analyst
Clearway Energy



TWO ORGANIZATIONS WITH UNIQUE CHALLENGES



CLEARWAY ENERGY

San Francisco, California

Private company in the
renewable energy industry

900+ employees in 32 states

65 locations and 20 HR team members
throughout the U.S.

Implemented PlanSource for
2021 open enrollment



CITY OF KALAMAZOO

Kalamazoo, Michigan

Public Sector

600+ employees
(including union employees)

Varying comfort levels with tech
(police, waste management and forestry)

Small and mighty team of 5 HR professionals

Implemented PlanSource for
2021 open enrollment

CLEARWAY ENERG | KAYLIE ZHANG

WHY PLANSOURCE?

Clearway Energy was searching for a **USER-FRIENDLY** platform that employees could access **YEAR ROUND**

They needed a **FLEXIBLE SYSTEM** to accommodate their comprehensive benefits package as well as ...

CUSTOM BUSINESS RULES to automate dependent and domestic partner documentation

OPEN ENROLLMENT

SEAMLESS & EASY open enrollment for employees
CONTACT CENTER available to answer employee's questions
REPORTING FEATURE helped HR keep track of employee's enrollment status

THE PLANSOURCE IMPLEMENTATION

Implementation lasted **4 MONTHS** and the PlanSource Project Manager helped everyone stick to this **SPECIFIC TIMELINE** by staying organized and making recommendations for **PRIORITIZATION** so OE could run smoothly

**REDUCTION IN
ADMIN EFFORT**

30
minutes per
new hire

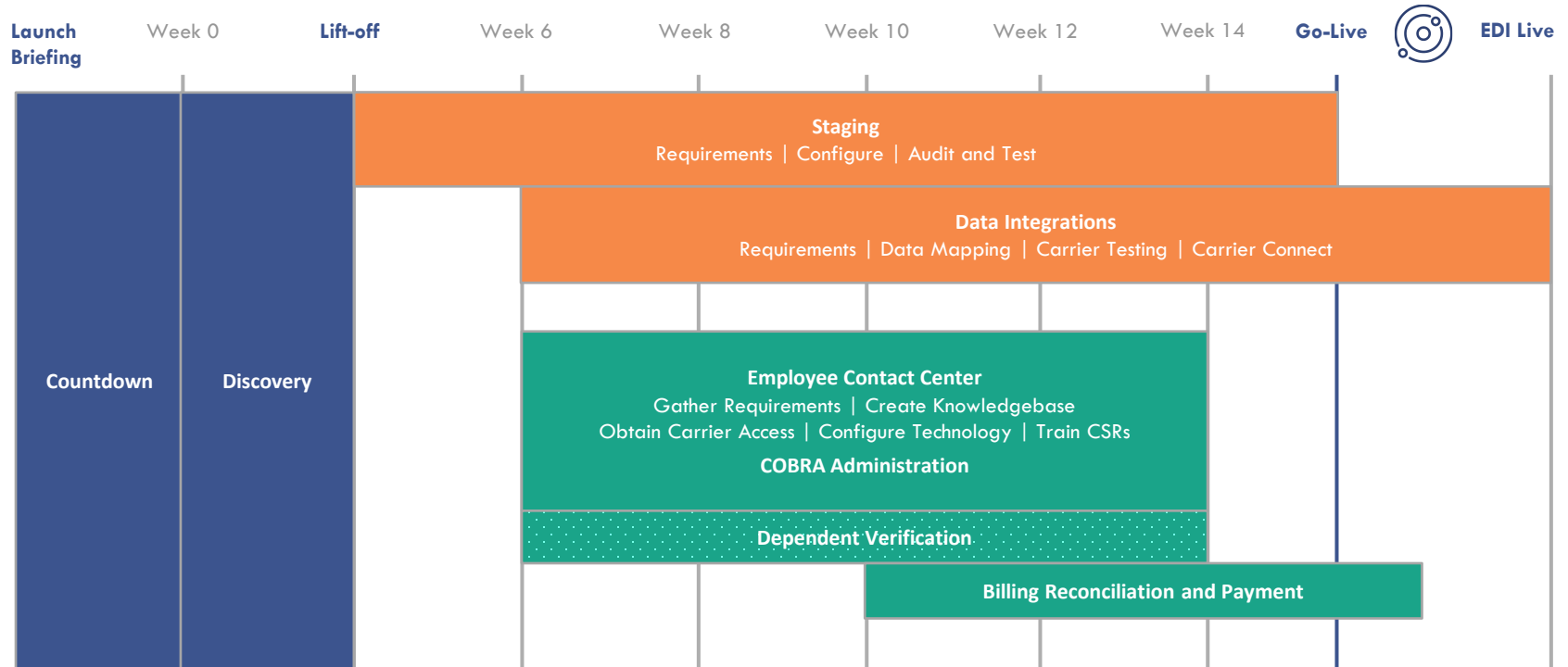
2
weeks worth of HR
time at OE

IMPROVED
reporting features

DECREASED
of employee questions
for HR

Clearway Energy Launch Timeline

DURATION: 4 MONTHS (07/06/2020 - 11/06/2020)



THE CITY OF KALAMAZOO | SHELLEY DUSEK

WHY PLANSOURCE?

INTEGRATION

between Kronos and PlanSource

ONLINE

open enrollment capabilities

TIME SAVINGS

of 1.5 hours per new hire

SEAMLESS

organization of the various union groups
and plans available

THE PLANSOURCE IMPLEMENTATION

VIRTUAL

meetings and trainings

RESPONSIVE

communication via multiple channels

REAL-TIME API

integration UKG Ready

VIDEO LIBRARY

for employee education

OPEN ENROLLMENT

PAPERLESS open enrollment that was

USER-FRIENDLY for HR team and Employees and saved HR **4 WEEKS** worth of time

**REDUCTION IN
ADMIN EFFORT**

1.5
hours per
new hire

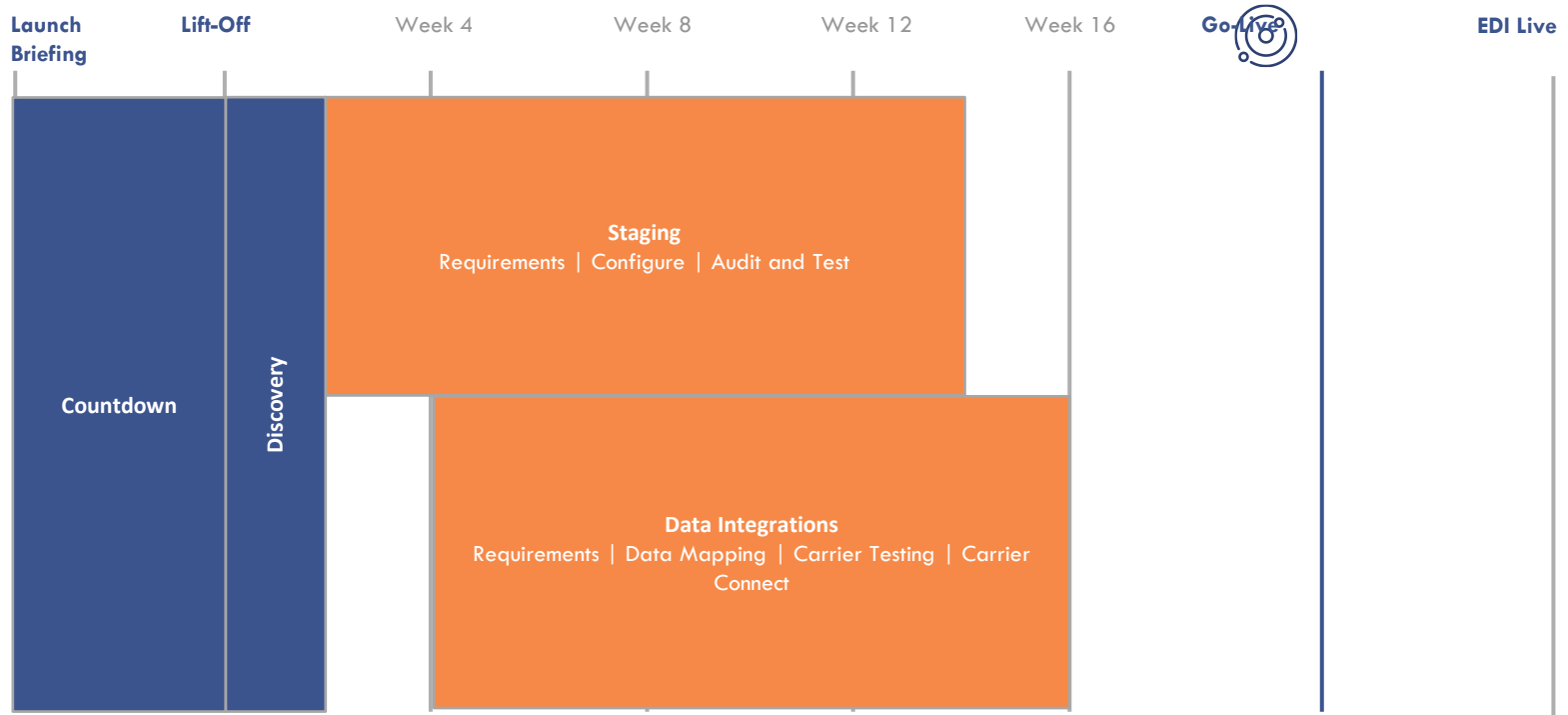
4
weeks worth of time
at OE

IMPROVED
data accuracy in
reporting

INCREASED
employee participation
and satisfaction

City of Kalamazoo Launch Timeline

DURATION: 4 MONTHS (06/09/2020 – 10/20/2020)



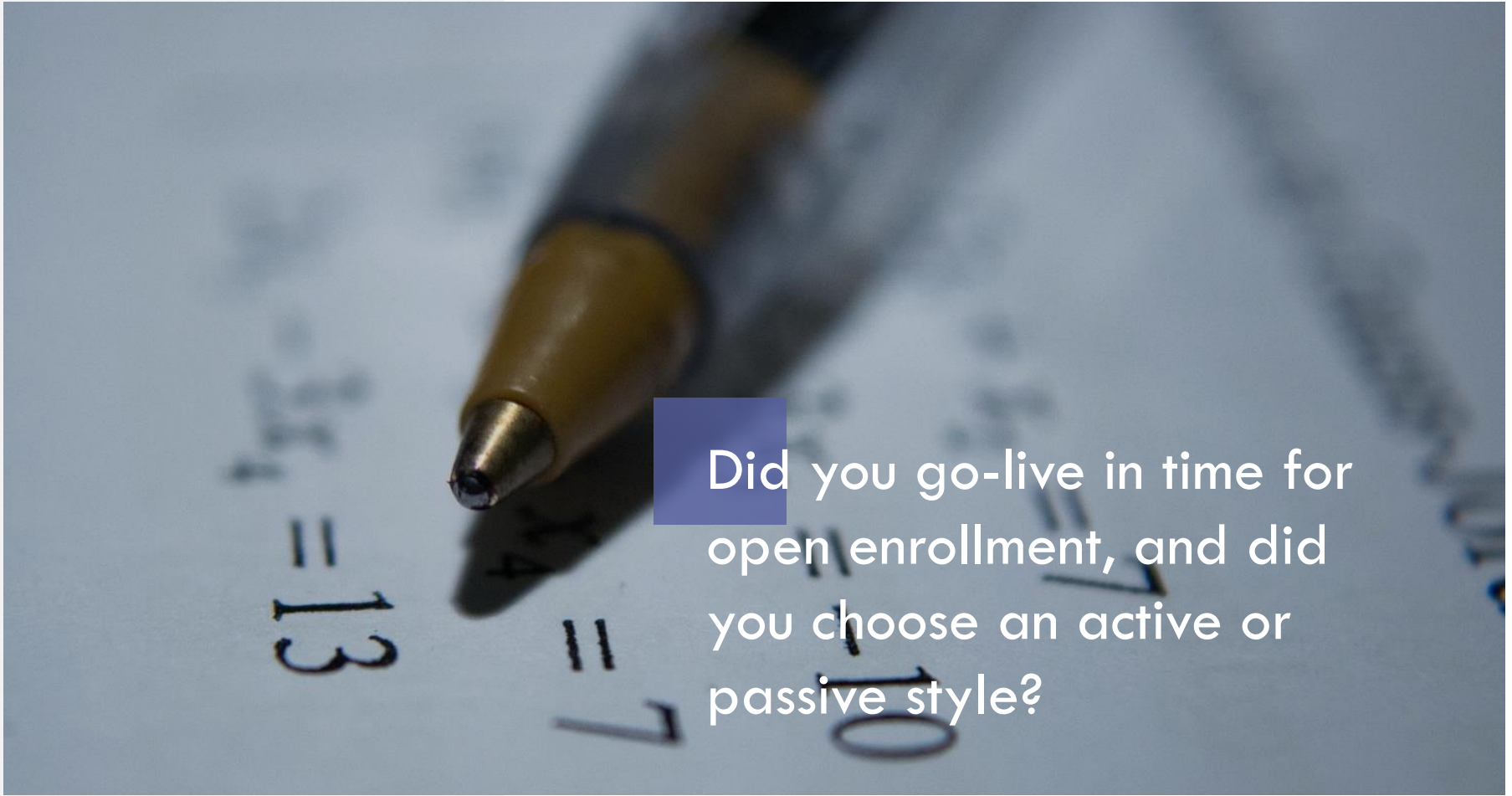
A woman with long dark hair, wearing an orange spaghetti-strap top and white pants, is looking down at a document on a desk. To her right is a large white Apple iMac computer monitor. The background shows a window with a view of a city building. A semi-transparent blue box is overlaid on the left side of the image, containing the text.

What was the role of your PlanSource Implementation Manager?

Choose the Launch Style That Fits Your Needs

THREE DIFFERENT LAUNCH STRATEGIES

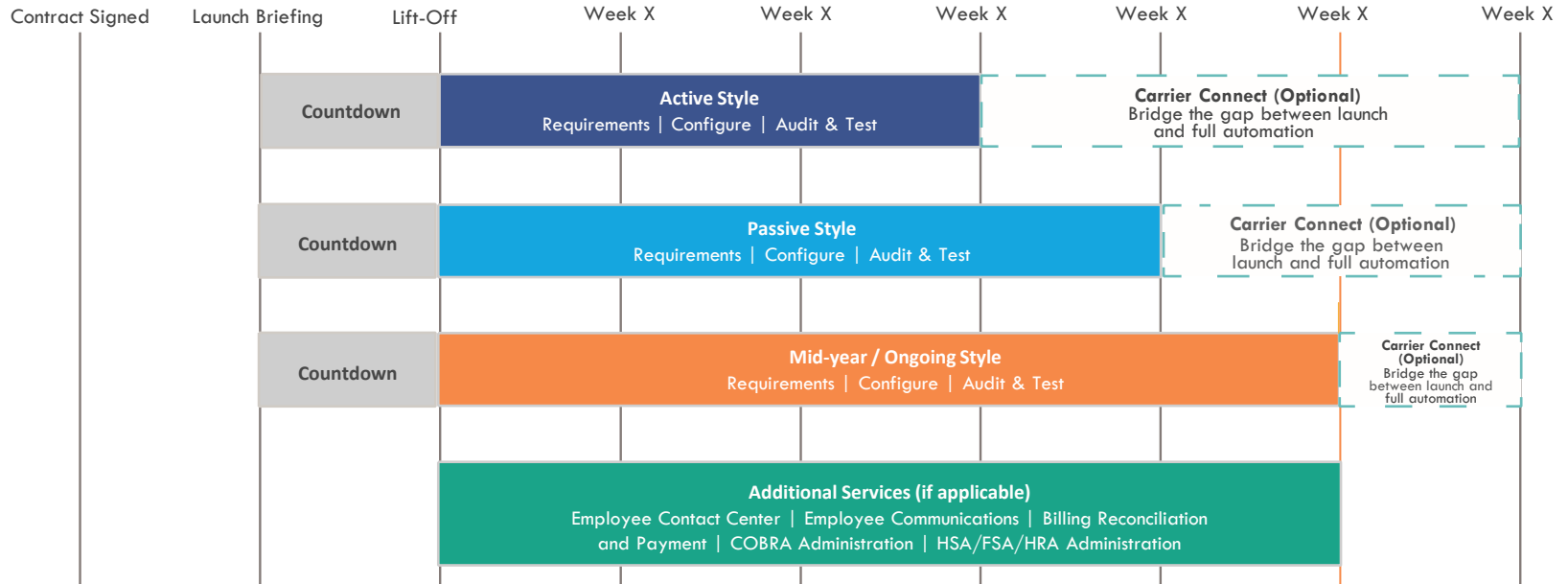
	ACTIVE	PASSIVE	MID-YEAR/ONGOING
EMPLOYEE PARTICIPATION	Required to log in and make benefit elections <i>Best practice for employee engagement</i>	Not required to log in and make benefit elections	Employees will be able to log in to process life events and new hires will be able to elect benefits
TIMING	Upcoming Plan Year: Launch is tied to open enrollment for the new plan year	Upcoming Plan Year: Launch is tied to open enrollment for the new plan year	Current Plan Year: Launch occurs in the middle of the benefits year and is not tied to open enrollment
PRIOR YEAR BENEFITS	Existing benefits are not loaded into the system; no data conversion is required <i>Fastest launch option</i>	Current coverages are loaded into the system <i>Data conversion required</i>	Current benefits are loaded into the system, for the current plan year enrollment <i>Data conversion required</i>
APPLICABILITY	Always available	Always available	Not available if: <ul style="list-style-type: none"> • Target go-live date is within 60- days of new plan year OR • Target go-live date is within 30 days of open enrollment




Did you go-live in time for open enrollment, and did you choose an active or passive style?

Launch Style Impact on Timeline

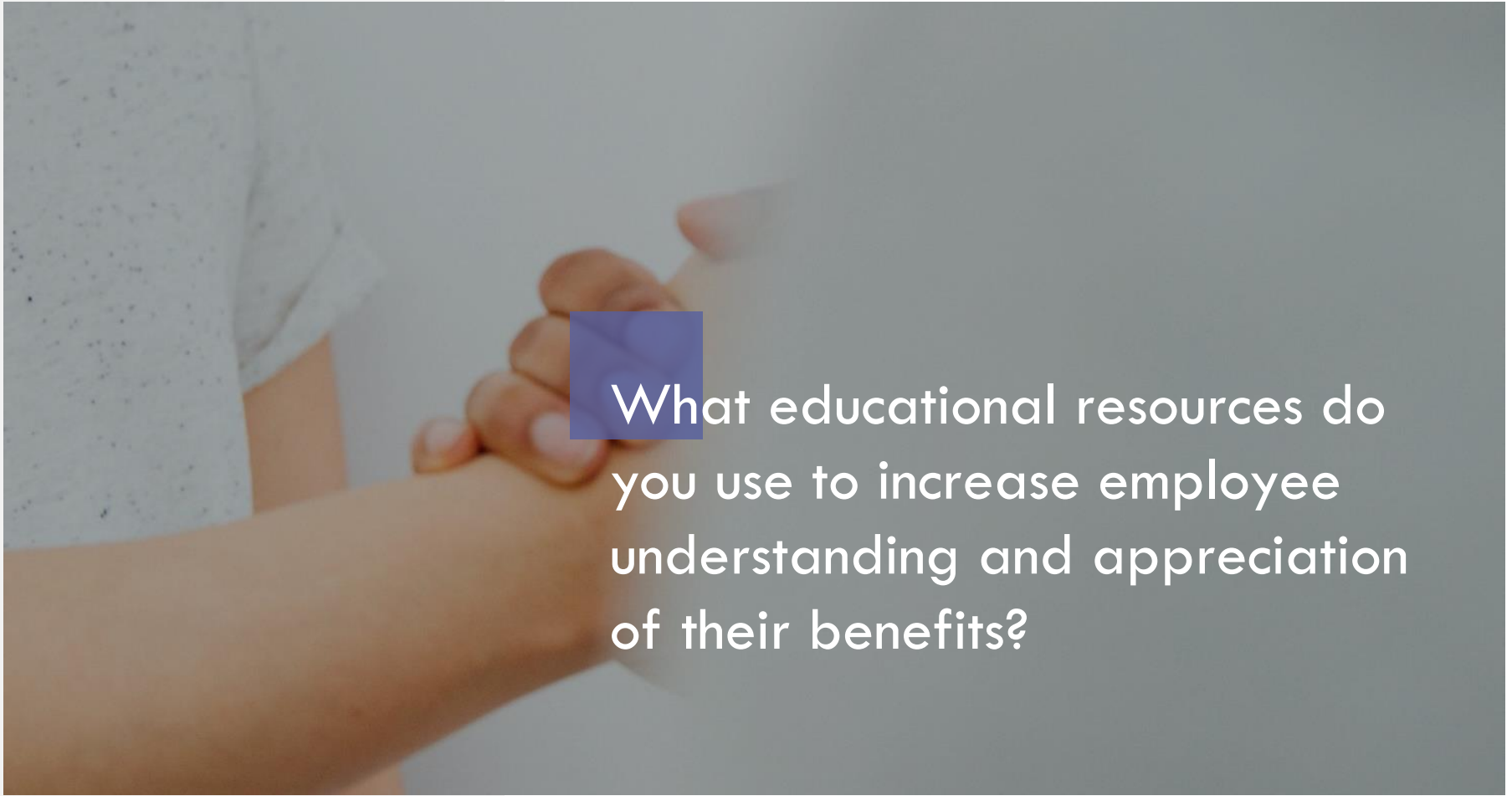
ACTIVE STYLE TYPICALLY TAKES 1/2 THE LEVEL OF CUSTOMER EFFORT



Though your individual Launch timeline will vary, here is a general illustration of what you can expect with each of the different launch styles. At Lift-Off, we'll review the timeline with you to make sure it works with your requested go-live date.

A hand holding a smartphone against a blurred background of people. The background shows a group of people in a social setting, possibly a restaurant or event, with warm lighting and a bokeh effect. The hand is in the foreground, holding the phone vertically. The text is overlaid on the left side of the image.

How did your open enrollment compare to prior years? How did it change the level of effort required from your HR team?



What educational resources do you use to increase employee understanding and appreciation of their benefits?

Employee Benefits Website

Welcome to Clearway Energy Benefits Website


COVID-19 Benefits & Resources

To find information on the 24/7 Medical Hotline, coverage under Aetna & Kaiser, Employee Assistance Program and Dependent Care, [click here](#).

Simple Actions to take with your benefits during Covid-19, [click here](#).

New Employees

All newly hired employees can enroll in 2021 benefits by logging into PlanSource at www.plansource.com/login or contact the Benefits Center at 855-423-3274, Monday – Friday, 8:00am-11:00pm EST.



What are some unique configurations that were set up during your launch to increase automation?



Top Benefits for City of Kalamazoo

Time savings for the HR team due to automation

Better data accuracy

Less time chasing down data errors

Increased employee understanding

Increased employee participation in benefits

Increased employee satisfaction with their benefits

A scenic landscape featuring a dirt 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. The overall mood is serene and natural.

What advice do you have for
HR teams preparing for their
benefits technology
implementation?

PREPARING FOR YOUR BENEFITS IMPLEMENTATION



Things to do before you select your benefits technology partner

<p>1 DEFINE SUCCESS</p>	<ul style="list-style-type: none"><input type="checkbox"/> What are your top 3 pain points in your current processes (i.e. what are you looking to fix)?<input type="checkbox"/> How will you define success for your implementation?
<p>2 BE STRATEGIC</p>	<ul style="list-style-type: none"><input type="checkbox"/> What are you looking to gain from your implementation of PlanSource?<input type="checkbox"/> What is your benefits strategy and how is it evolving?
<p>3 CLEAN UP YOUR DATA</p>	<ul style="list-style-type: none"><input type="checkbox"/> Assess the quality of your benefits data.<input type="checkbox"/> Resolve data integrity issues now prior to the start of your implementation.



Q&A

TO LEARN MORE:

plansource.com/launch
plansource.com/contact