

# PlanSource and SAP SuccessFactors



## Enhancing the Benefits Experience, Together

### SAP SuccessFactors

SAP SuccessFactors Human Experience Management Suite offers individualized experiences and strategic solutions—with mobile self-services available anytime, anywhere that empower employees to reach their full potential. SAP SuccessFactors solutions are cloud-based HCM software applications that support core HR and payroll, talent management, HR analytics and workforce planning and employee experience management.

### PlanSource

The PlanSource platform provides the best experience possible for benefits communications, engagement, shopping, enrollment, billing, compliance and ongoing administration. We partner with leading brokers, carriers and tech providers to provide companies of all sizes with a complete solution for benefits administration.

### Together

The PlanSource and SAP SuccessFactors partnership offers an enhanced shopping experience by consolidating benefit choices to one site and utilizing familiarity, personalization, and single sign-on. Not only is this streamlined experience conducive to employees, it also optimizes ROI by reducing HR's workload and eliminating manual processes. With PlanSource technology embedded into SAP SuccessFactors, employees can select their benefits efficiently and HR departments are able to manage those choices in a real-time data exchange all within one easy-to-use system. Leveraging PlanSource's leading benefits technology and SAP's comprehensive employee portal allows for a comprehensive and intuitive end-to-end employee and HR experience.

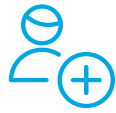
### Why PlanSource and SAP SuccessFactors?

- » **Leading providers** – A benefits solution backed by two trusted, proven industry-leading providers
- » **Fully embedded user experience** – Provides a seamless experience for employees within SAP SuccessFactors Employee Central
- » **Single Sign-On** – Employees and HR administrators can access their benefits easily within the SAP SuccessFactors user experience
- » **Modern API integration** – Allows the passing of secure, accurate, real-time data
- » **Real-time data sync and changes** – Employees can easily make changes to their benefits right from SAP SuccessFactors' website and it will be reflected in payroll deductions within SAP SuccessFactors Employee Central Portal

## PlanSource Offers the Best Experience For



Benefits  
Shopping



Enrollment



Billing



Compliance



Administration



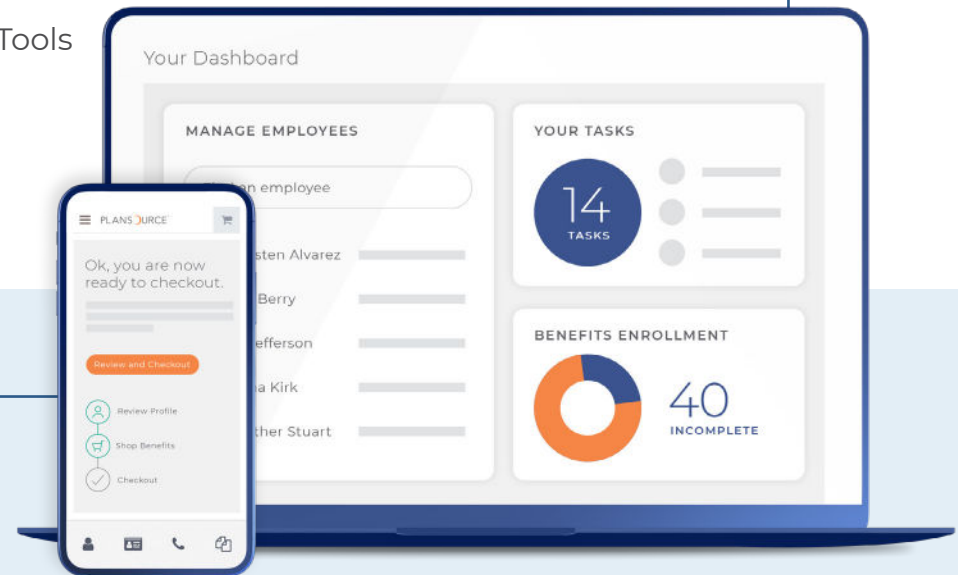
Employee  
Engagement

### A Mobile-Friendly Employee Experience

Self-Service Access  
Educational Videos and Content  
Personalized Recommendations  
People-Friendly Experience  
Mobile Shopping and Checkout

### Sophisticated Benefits Administration and Automation

Eligibility Management  
Employee Communication Tools  
Cost Calculations  
Flexible Reporting  
Ecosystem Integration



### PlanSource Boost

A groundbreaking program that provides organizations with industry-leading benefits technology and carrier API integrations that modernize the benefits experience for employees and HR teams.



**Preferred pricing**  
when customers  
offer one or more  
Boost products



**Employee shopping**  
experience  
optimized to drive  
engagement



**Modern API**  
integrations that  
provide a real-time  
customer experience



**Simplified self-billing**  
that eliminates the  
need to reconcile  
carrier bills