



PLANSOURCE<sup>®</sup>

Solutions for Resellers

PlanSource Differentiates Your Offerings

# What Does it Mean to be a Reseller?

PlanSource partners directly with brokers, enrollment firms, value-added technology partners, HCM companies and TPAs to provide a best-in-class benefits technology solution to their customers. The reseller serves as one of PlanSource's channel partners and sells the PlanSource technology to its customers.

## EMPOWER YOUR SUCCESS

As a PlanSource reseller partner, you manage all aspects of the customer relationship, including implementation, annual open enrollment and everything in between. You control your own destiny and put our sophisticated technology to use while handling the unique needs of your customer base.

## HOW DOES PLANSOURCE PARTNER WITH RESELLERS?

You need more than a great ben admin platform. You need a true partner that will train your team and help you get launched for success. We'll provide your team with initial training, enablement support, a Go-to-Market launch package and technical support that allows your tech-savvy staff to focus on more complex needs.

### With PlanSource's technology you can:

- Provide a customized experience
- Implement, support and renew your customers seamlessly
- Reinforce your brand
- Increase revenue growth through additional software feature add-ons and benefit product optimization

### What PlanSource offers:

- A channel dedicated to reseller success
- Sales and marketing support
- Initial and ongoing training
- A strategic partner program to support resellers
- Innovative, modern benefits experience
- World class enablement team to help with new reseller success and onboarding
- Opportunity to influence development of product functionality to meet your business needs



## The Right Level of Support Every Step of The Way

**A PARTNER YOU CAN COUNT ON**



**More than half** of the customers that use PlanSource are implemented and supported by our growing community of reseller partners.

As a PlanSource reseller, you'll not only get innovative products and technology solutions from a leading provider of cloud-based benefits administration technology, but also valuable training and enablement programs to help you make the most of your investment.

A great platform is only half of the equation. You need a proven partner that is there to guide you through your journey to success.

# The Program

Let's take a detailed view at how we support you as a reseller of PlanSource:

## THE FOUNDATION OF THE PARTNERSHIP

### Joint Business Plan

PlanSource resellers have the opportunity to engage with our highly skilled sales and Go-to-Market specialists, who are here to help through all phases of the sales cycle.

The business plans are designed to:

- Agree upon annual joint sales goals and revenue targets
- Ensure alignment with both parties on joint activities and opportunities
- Help ensure coverage and support for sales and marketing activities
- Identify revenue at risk
- Outline sales and other training opportunities
- Review partner goals and areas of growth

### Internal Sponsors

Partners are required to provide an appropriate level of designated sponsor based on the size of the partnership.

We ask that there are two primary contacts that function in different areas:

- Operations – this person is aligned to the Technical Support Manager and is focused on existing customers using PlanSource
- Sales and strategy – this person is instrumental within the partner to make decisions and drive strategy

Key aspects of the sales and strategy sponsorship role:

- Agree to the annual joint business plan
- Participate in quarterly business reviews
- Ensure reseller maintains appropriate staffing levels to support existing customers and add new customers based on the growth objectives
- Govern strategic and revenue partnership goals
- Resolve escalations (if and when needed)



## Internal Dedicated Team

Reseller partners must commit to establish and maintain a dedicated team that will support PlanSource products and solutions.

It is crucial that our partners maintain staffing levels to fulfill the reseller responsibilities as outlined in the Reseller Roles and Responsibilities exhibit. Staffing levels are specific to each partner. An example of staffing needs for running our platform, include:

- Manager
- 3+ Configuration Specialists
- 2+ Technical / Data Specialists
- Billing Contact

# System Training

## INITIAL AND ONGOING TRAINING

You'll start with our comprehensive, virtual instructor-led training Reseller Foundations course, and then access our dedicated reseller training center within PlanSource University.

### Enablement

New partners embark on our Reseller Enablement Journey and may also complete the Reseller Foundations training. This is a bridge program designed to help partners transition from initial training to ongoing success.

The first step is a thorough environmental analysis. This creates a framework that illustrates how a new partner is structured and what current workflows already exist. It also provides best practices for the reseller to address potential gaps, as well as an understanding of how to best engage with each other during the 5-month enablement period.

During enablement, our team helps partners:

- Understand the configuration requirements for complex scenarios
- Guide resources in example builds of additional system functionality
- Discuss system processing and explain best practices

### Train the Trainer

Our key to long term success is our “train the trainer” model. While new team members are eligible to attend our Foundations training as they onboard into your organization, resellers are also required to train newcomers on reseller specific workflows, configurations, renewal requirements, sales processes, and other key processes as well.

### Learning and Development

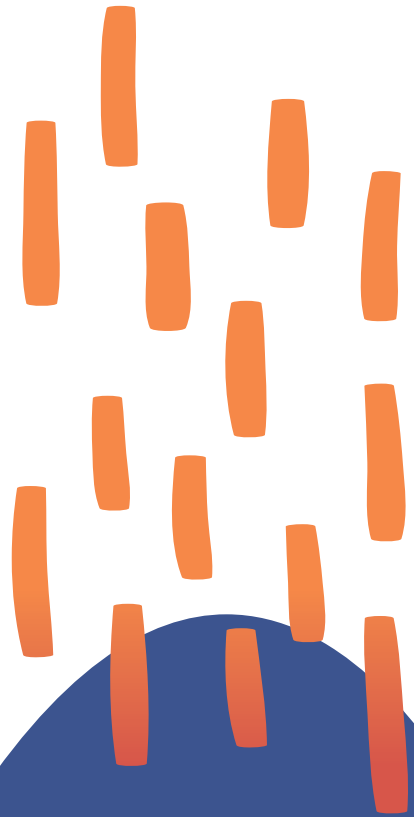
Browse a full catalog of PlanSource courses to find just what you need. Courses include videos and articles on dozens of relevant topics. Additionally, you can attend one of our live webinars to learn the latest happenings in the HR space.



## PlanSource University

You have 24/7 access 365 days a year to our in-product learning hub that contains tons of self-led training, including courses and certifications, how-to videos and training webinars.

Search by topic and gain access to system trainings that your team can view on demand, including training designed specifically for resellers.



# Sales and Marketing Support

PlanSource provides you with marketing collateral and resources to help you build and nurture your pipeline, and field sales support to help you close deals when you need a little extra assistance.

## Go-To-Market Package

Partners receive an initial Go-to-Market package that will set them up with all the sales tools they need to bring our solution to the market.

System Demo Set Up and Training (provided to new partners during their enablement and onboarding period)

- Build initial demo site with partner
- Deliver a recorded demo designed for a customer (HR and Employee view)
- Provide demo script so partner can get the lingo and accurately represent the value of our solution
- Coaching and feedback on how to demo PlanSource – we'll practice with you "live"!
- ACA demo training
- IQ Suite demo training

## Selling PlanSource


- How to differentiate PlanSource as a reseller technology
- Leading a discovery session
- Deal Review – partnering on large strategic wins
- RFP best practices and FAQs
- Providing sales presentations and guidance on how to use PlanSource collateral
- Social media campaigns our partners can use

## PENDO Guides

PlanSource collaborates with partners to deploy in-system messaging that allows resellers to communicate important messages to system users, cross sell specific features of

the solution and survey customers. Throughout the year, we will work with partners to deploy these messages, provide tracking and analytics and share leads as they are generated.





## Communication and Newsletters

PlanSource partners will receive varying communications to keep them in the know, with the option to unsubscribe from areas that are not of interest.

Communications include:

- Product release updates and user notes
- Invitations to PlanSource webinars, events, and training opportunities
- Thought leadership
- Best practices that can be applied internally or with your customers
- Opportunities to engage in customer specific campaigns

# Advisory Board and Roundtables

Give ongoing feedback through advocacy programs like our Elite Advisory Board and Reseller Roundtables.

## Elite Advisory Board (EAB)

PlanSource is a customer-driven company. We understand that our future success depends on keeping our mutual customers happy. Maintaining a balance between growth and retention is a direct result of PlanSource staying current, compliant and relevant. One key approach we take is listening to and having quality conversations with our partners and customers through our PlanSource Advisory Boards.

The Elite Advisory Board for Resellers is a group of PlanSource's highly valued, innovative and forward-thinking strategic partners. It was designed to provide a forum in which collaboration among industry peers can occur.

Within this group, PlanSource can organize and focus partner recommendations on the most important issues, identify customer and industry best practices in benefits and human resources, and expose partners to PlanSource strategy, key initiatives, performance and product roadmap.

Our EAB for Resellers is a membership-only group of qualifying partners. It is composed of one representative per reseller partner.

Meetings are held multiple times per year, both in-person and remote.

## Reseller Roundtable

Our Reseller Roundtable is an exclusive, invitation-only group that provides a forum for PlanSource to train its power users and keep them up to date on the latest information so they can continue to create wildly successful customers.

By participating in the Reseller Roundtable, partners will:

- Be in the know – Stay up to date on what's happening at PlanSource and establish relationships with PlanSource leaders
- Let your voice be heard – Influence the direction of the PlanSource strategy and product roadmap
- Grow your network – Collaborate and network with our power users and industry experts
- Share best practices – Accelerate your success by learning from the knowledge and experience of other resellers

# Our Program at a Glance

	RESELLER PARTNER
<b>BUSINESS CRITERIA</b>	
Minimum Requirements	●
Favorable credit rating	●
<b>PARTNERSHIP REQUIREMENTS</b>	
Qualify and register in partner program	●
Adhere to Partner Code of Conduct	●
Attend monthly educational webinars	●
Commit to joint go-to-market business plan	●
Designate partnership sponsor for operations side and one for strategic sales and growth	Executive
Collaborate on quarterly business reviews (sponsor participation required)	●
Establish and maintain dedicated team for PlanSource installed products	●
Enable available integrations when in general availability	●
Develop joint customer references / case studies	2 per year
Engage with PlanSource on social media	●

	RESELLER PARTNER
SALES AND MARKETING SUPPORT	
Proactive consultation and planning with Partner Account Executive	●
Company profile on PlanSource website	●
Elite Advisory Board - Reseller	●
PlanSource exclusive events	●
Pendo Guides	4 per year
Boost carrier product optimization consulting	●
Social media spotlight (case study)	2 per year
SYSTEMS AND PRODUCT	
Designated Technical Account Manager	●
Designated Technical Account Analyst	●
Help Desk	●
PlanSource University	●
Community forum	●

PlanSource reserves the right to modify the partner program at any time, without notice.

## Why PlanSource?

PlanSource helps centralize and simplify every aspect of your customers benefits program, so employees and HR teams can make smarter, more confident benefits decisions. We believe the easier benefits are to understand, use and manage, the more value people get out of them. So we're on a mission to create the best benefits experience possible to do just that.

## The Benefits of Partnering With PlanSource



Higher voluntary  
employee participation



Higher productivity  
in your agency



Higher customer  
retention



Higher win  
rates



Higher level of engagement  
in HR tech experience



Higher revenue  
per case

