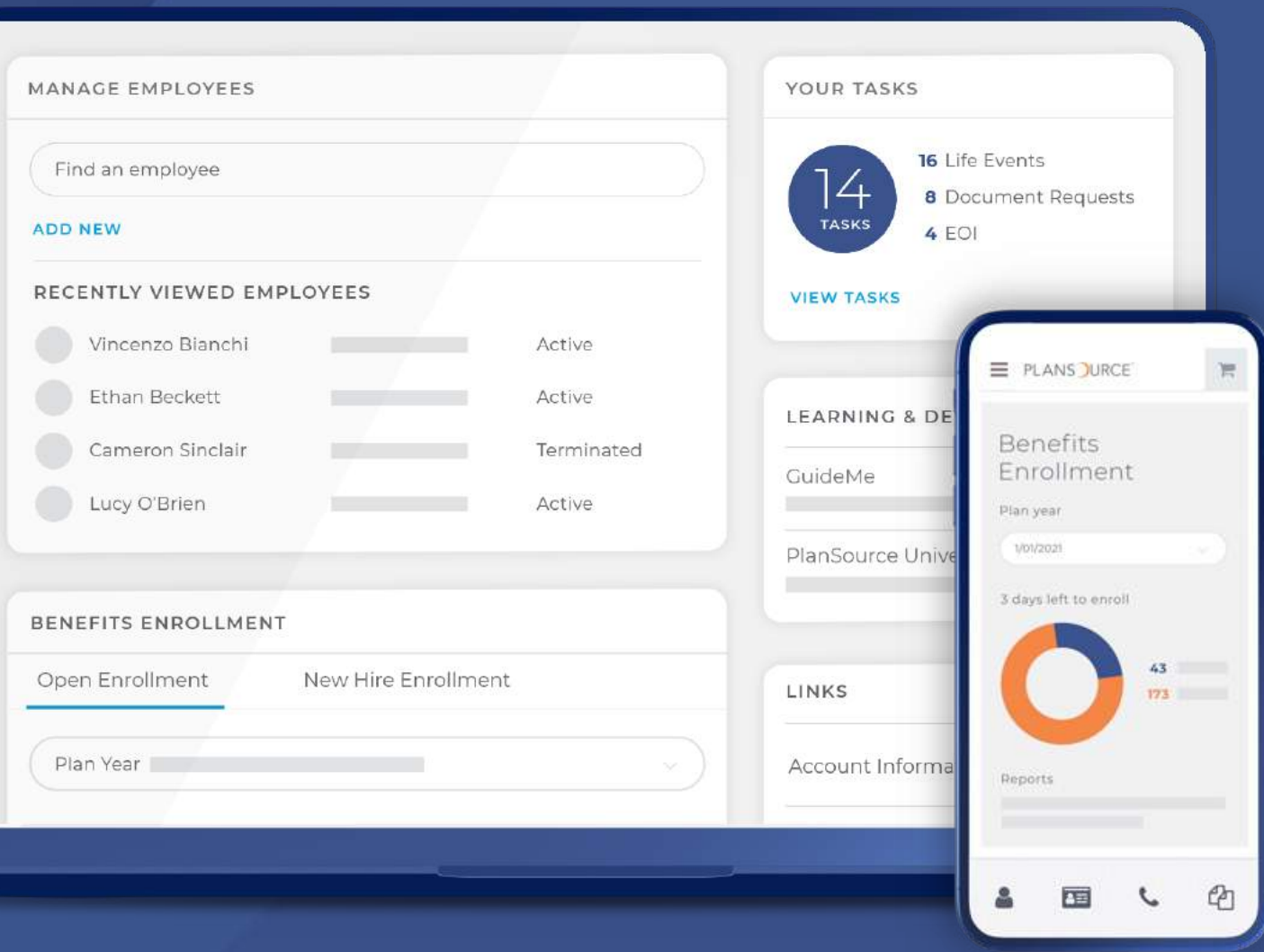




How to Drive Benefits Engagement Through Innovation



PLANSOURCE

Spend less time
managing
employee benefits

Automate and simplify every
aspect of your benefits
program with PlanSource

Today's Speakers



Bradley Taylor
Chief Strategy Officer
PlanSource

AGENDA

Review key statistics around engagement

Share helpful engagement technology solutions

Discuss how to personalize the benefits experience

Walk through examples of what this software means for employees



Understanding the Stats

benefits engagement, utilization and more

POLL QUESTION

How many different benefits, programs and point-solutions do you offer your employees?

A. 0-10

B. 11-20

C. 21+

POLL

16

**Average number of benefits
offered by employers in 2022
within the shopping experience**

EMPLOYERS INVEST HEAVILY IN BENEFITS THAT THEIR EMPLOYEES AREN'T FULLY UTILIZING

15 MIN

EMPLOYEES SPEND
CHOOSING
BENEFITS

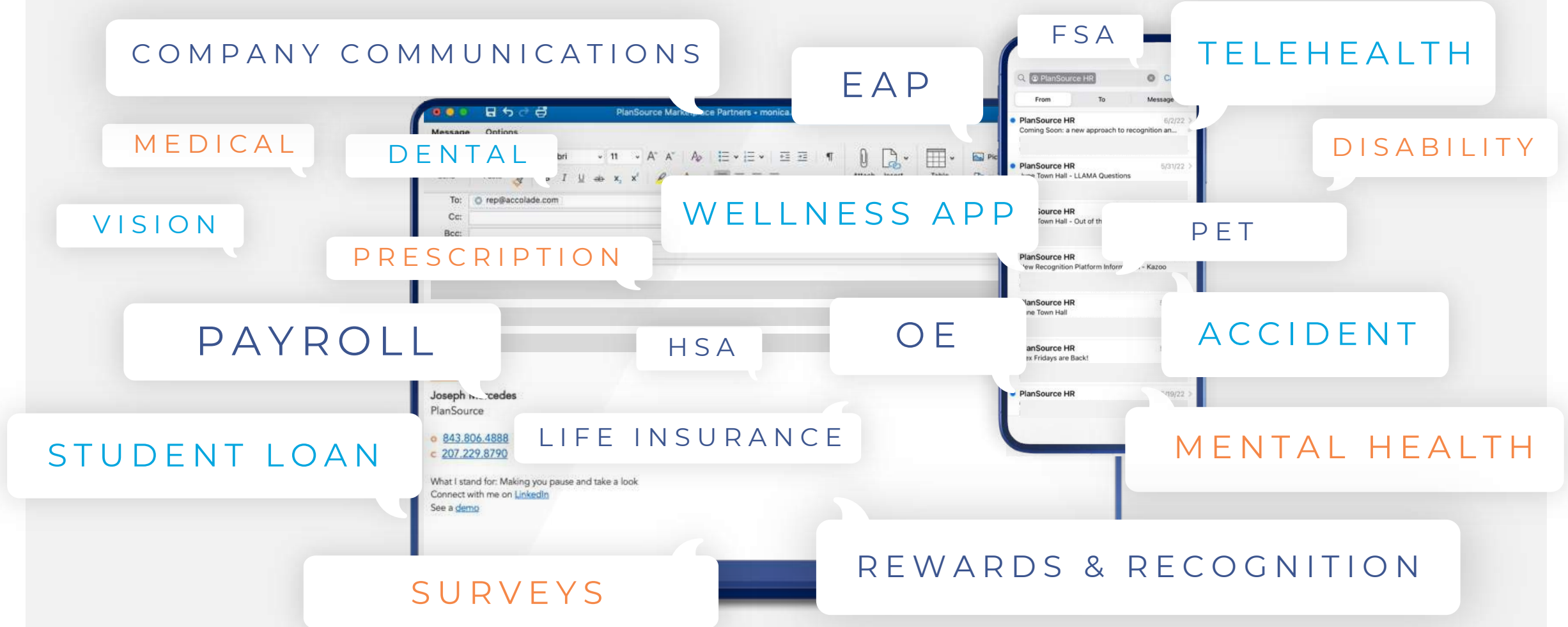
\$10,000

EMPLOYERS
SPEND PER
EMPLOYEE

80%

COMPANIES SAY
EMPLOYEES DON'T
READ MATERIALS

Employees Are Also Bombarded with Additional Initiatives...



Typical customer, employee, broker and carrier needs are left untouched with traditional benefits administration

Employees



Benefits education is never contextual and at a time when it's meaningful



Choosing benefits and using benefits aren't connected and often, using requires registering somewhere else

Customers



Building the budget and managing the escalating cost of benefits



Engagement and utilization of the plans is weak, data is lacking and combating low perceived value

Brokers



Customers expect results from the strategies they fund



Limited means to drive strategies directly to the employees, spouses or adult dependents

Carriers



Customers expect their supplemental-health provider to help employees use the coverage



The perceived value of these benefits is low when employees forget they have them

Questions From The Employee Lens



What benefits and other offerings are available for me to choose from?



How do I know which benefit plans are right for me?



Where do I find and access the various benefits I enrolled in and am paying for?

Innovative Technology

employee engagement solutions

POLL QUESTION

Do you have a tool to centralize your benefits information and enrollment experience?

A. Yes!

B. No, but we are considering investing in one!

C. I haven't heard of that but I'm curious to learn more!

POLL

THE SOURCE PUTS IT ALL IN ONE PLACE



The Source allows employees to achieve better engagement and utilization of benefits



SINGLE SIGN-ON

Seamless access all benefit sites with a single login password



FIND A DOCTOR

Talk to a doctor, find a provider, view plan usage and access ID cards



ENROLLMENT

Shop, enroll in benefits and see recommendations powered by DecisionIQ



COMMUNICATION

Communicate with employees any time via text or email



DASHBOARD

All company information including news, benefits and videos, in a single view



AUTO REGISTRATION

Employees are auto enrolled in certain benefits

But Employees Still Have Questions...



When do I need care? How do I know when to use the different benefits?



Are there programs offered to me that I don't know about? What are they?

Introducing

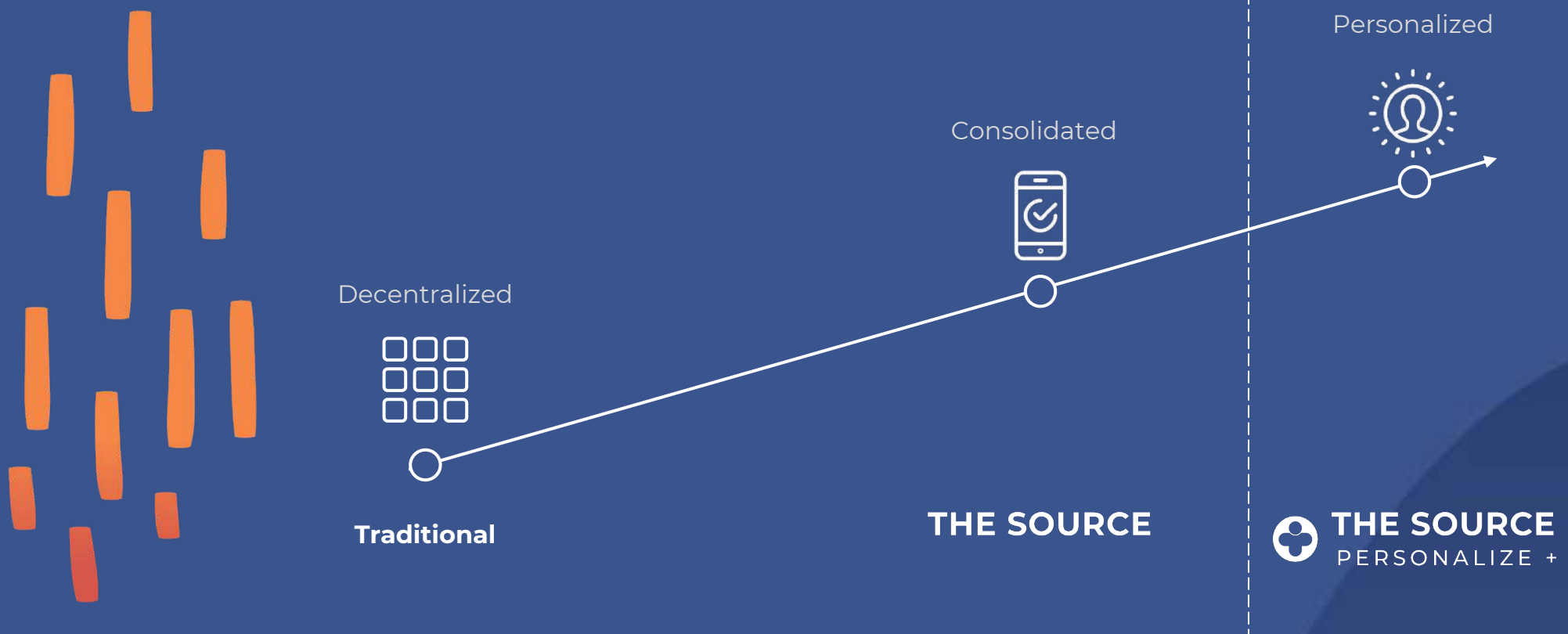


THE SOURCE
PERSONALIZE +

Using employee data
we deliver the right message, the right way, at
the right time to take employee engagement
to the next level

The Source Personalize+ will enable you to elevate your employee engagement in their benefits

Benefits and communications delivery

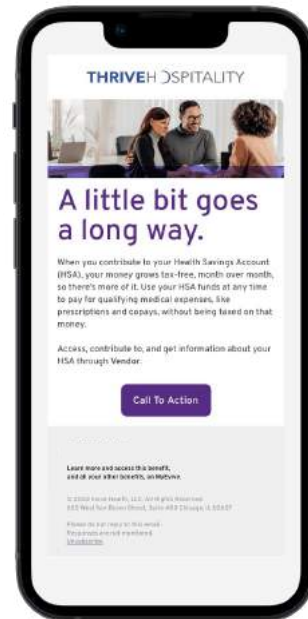


Personalized messaging drives benefits utilization

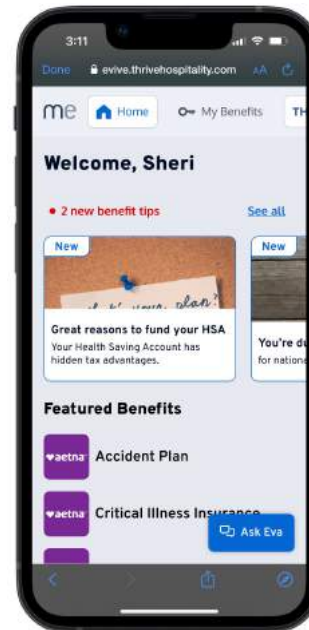
Sample messaging journey



**Proactive
notifications**



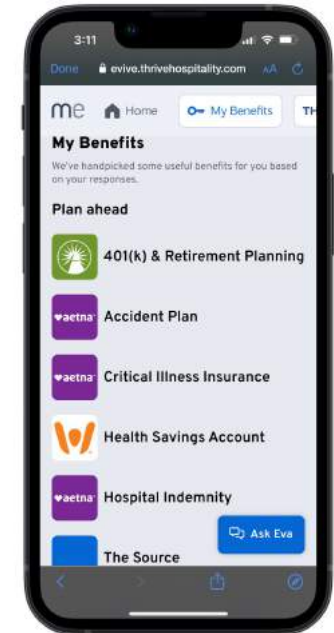
**Campaign
Message**



**Personalized
Recommendations**



**Timely
Reminders**



**Benefit
Access**

From Automated Personalized Messaging to Benefits Utilization

It's all connected to **The Source** via SSO from the “My Health & Wealth” tile



With The Source Personalize+, data drives the personalization

How it works - The Source Personalize+ Solution Overview



Personalize+ Requires Experience and Security Controls

To execute this offering, PlanSource is partnering with the leading provider in market

Evive is the engine to deliver these messages

Founded in 2007, headquartered in Chicago, services 4M+ lives and delivers over 130 categories of pre-defined, data-driven recommendations

Evive's application has been fully reviewed and approved by information security, data privacy, and legal teams at the most highly regulated companies

End-to-end HIPAA compliance across technology, security, and operations

Independent compliance controls validation in **HITRUST CSF and SOC2**



With this partnership, PlanSource further connects “Choosing and Using” and integrates Evive’s value of personalized, data driven messages to close gaps in care

Data about the individual and their behavior makes personalized messages more relevant

Multi-pronged approach to personalization



PREDICTIVE ANALYTICS

The use of data, statistical algorithms and machine learning to identify the likelihood of future needs.



GAPS IN CARE

The difference between recommended care and the care that an individual receives.



MICRO SEGMENTATION

Targeting a specific group within a population based on shared attributes such as location, demographics, health conditions, or predicted behaviors.



BEHAVIORAL SCIENCE

The study of the many factors that influence how humans react. The Source Personalize+ uses behavioral science to find the most effective messaging to inspire action.



CLOSED-LOOP REPORTING

The ability to track engagement metrics, including sent messages, impressions, clicks, and conversions.

Leading Supplemental Health Carriers are Integrating Utilization and Enrollment Messages

PlanSource is partnering with these Boost carriers to look at a participant's medical plan usage and drive awareness and engagement for those that have selected Accident, Critical Illness and Hospital Indemnity insurance plans



The Source Personalize+ Examples

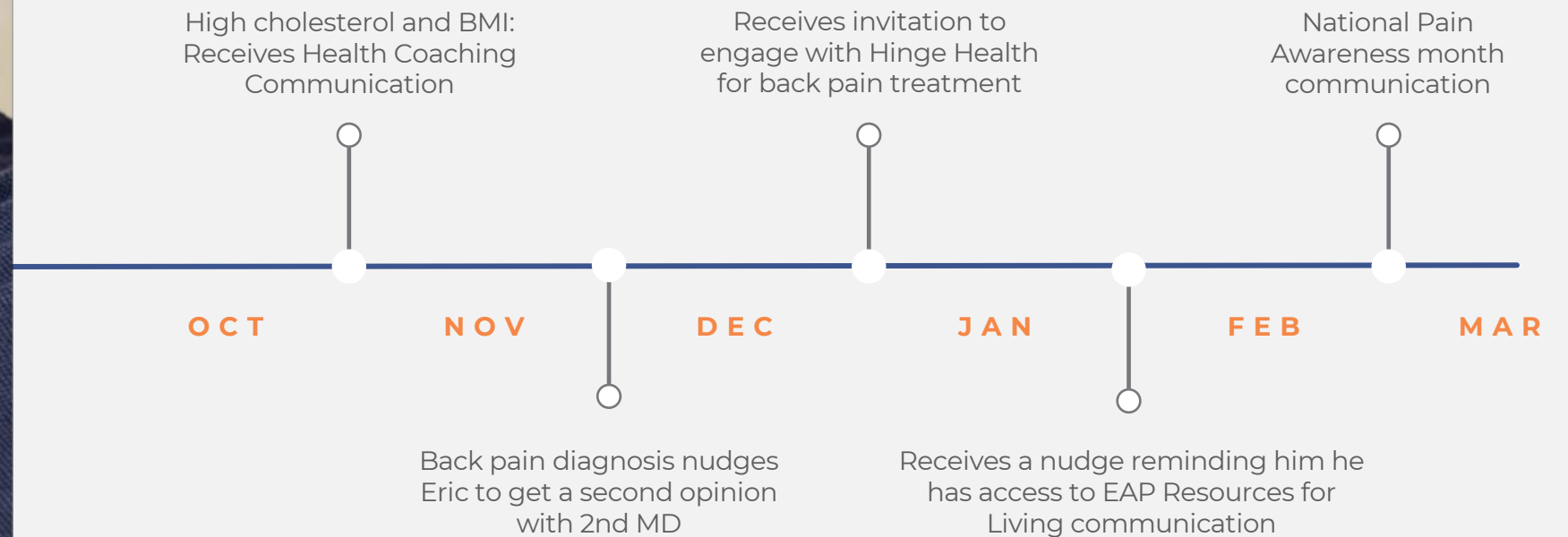
delivering personalization to your employees



Employee Profile: **MEET ERIC**

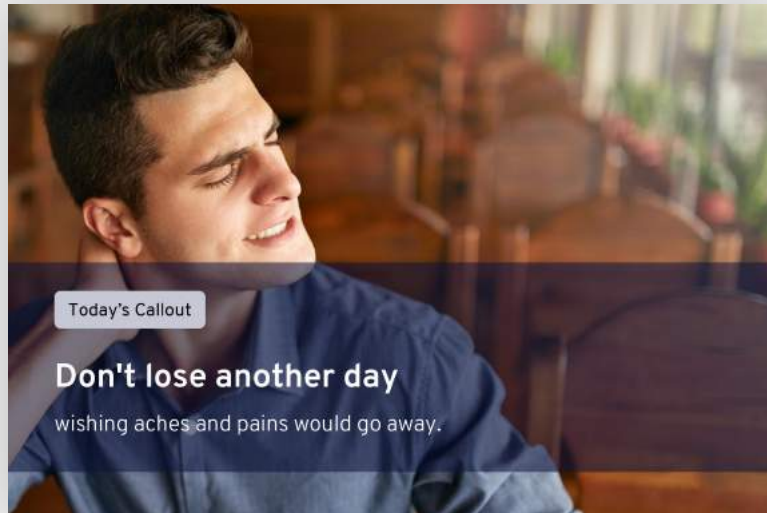
Age 55 • Married

Assumptions: Sedentary lifestyle, high cholesterol and BMI, back pain, not fully contributing to HSA



PERSONALIZED RECOMMENDATIONS

Sample Callouts Driving Benefits Engagement



MSK MANAGEMENT

This Callout invites users with back pain, knee pain, or shoulder pain to seek treatment with a service such as Hinge Health. The user's condition is highlighted in the headline of the Callout detail page.



PREDIABETES PROGRAM ENROLLMENT

This Callout invites users with prediabetes to engage with a tool that will help them make lifestyle changes to reduce their risk of diabetes.

IMPACTFUL OUTCOMES

26%

Relative lift among Evive users vs. non-Evive users in cancer screenings

7.4%

of diabetic users enrolled in the diabetes management program after viewing a personalized message from Evive

17.4%

Relative lift among Evive users vs. non-Evive users in virtual care utilization

15%

of users due for preventive care completed a preventive care screening after viewing a personalized message from Evive

7.7%

Relative lift among Evive users vs. non-Evive users in metabolic screenings

13.4%

of hypertensive users joined the hypertension management program after viewing a personalized message from Evive

**TARGETED
MESSAGING**



SIMPLICITY



**Elevate Your
Engagement**

What's Next: Future Employee Needs



How can I get my benefits-related questions answered?



Where should I go for care? How do I know its high-quality?



How much will this care cost me?



Q&A

SHRM AND HRCI CODES

SHRM: 23-YZPNQ

HRCI: 602328