

# PLANSOURCE IS BROKER FRIENDLY

## We are on your side.

At PlanSource, we do not compete against brokers or sell direct to employers. In fact, our entire business model is designed with benefits brokers and consultants in mind.

With a complete portfolio of benefits software and services, PlanSource will help you grow your business and keep your customers happy. Simply said, our job is to help you win.

## OUR BROKER PARTNERSHIP MODEL

### HOW WE PARTNER WITH BROKERS

PlanSource caters to top performing brokers. For brokers and consultants that generate and exceed certain business thresholds, PlanSource rewards their commitment to our partnership with benefits.

These benefits are designed to help partners win and grow their business. With these personalized services, PlanSource emphasized building and maintaining a productive and efficient business relationship with its top producers.



Marketing collateral that helps you sell new business



Online resources that help your producers produce



First look at upcoming software releases



Designated team to help you sell new business



Field sales support to wow your prospects



Designated team to help manage existing business



Quarterly "state of the partnership" meetings

# PLANSOURCE HAS FLEXIBLE PARTNERSHIP MODELS

**REFERRAL PARTNERSHIP** if you tend to be...  
 Limited in technology expertise and marketing resources  
 Constrained by resources and capacity  
 Focused more on “the business” vs. “the technology”  
 Prioritizing other areas of your business ahead of technology  
 LEARN MORE AT [PLANSOURCE.COM/BROKERS](https://plansource.com/brokers)

**RESELLER PARTNERSHIP** if you tend to be...  
 Staffed with tech-savvy team members  
 Ready to make an investment with resources and marketing  
 Using technology as an integral piece of your strategy  
 Focused on developing strategic relationships with clients  
 LEARN MORE AT [PLANSOURCE.COM/RESELLER](https://plansource.com/reseller)

	REFERRAL	RESELLER
Branding	●	●
Customer Relationship Management	Partner	Partner
Setup and Implementation	●	Partner
Support	●	Partner
Data Exchange with 3rd Parties	●	● or Partner

## HERE'S A FEW OF OUR TOP BROKERS



## THE BENEFITS OF PARTNERING WITH PLANSOURCE



Higher voluntary employee participation



Higher productivity in your agency



Higher customer retention



Higher win rates



Higher revenue per case



Higher engagement in HR tech experience