

The image features a modern, abstract background with large, overlapping organic shapes in orange, light blue, and dark blue. The Plansource logo is positioned in the top left corner, with the word 'PLANSOURCE' in white, uppercase letters. The 'O' in 'SOURCE' is replaced by a stylized orange circle.

PLANSOURCE

Client Satisfaction Surveys

Customer Health

2023 Outcomes for Customer Satisfaction

**Health
Sentiment**

4.1



0.35 Above target

OE CSAT

4.3



0.3 Above Target

CES

4.4



0.4 Above Target

Open Enrollment Customer Satisfaction Survey (CSAT)

Our Customer Satisfaction Survey is sent to clients following the conclusion of open enrollment

Customer Effort Score (CES)

Measures customer's satisfaction with interactions with special services (call center, COBRA team, additional services)

Customer Health Sentiment

Monthly dialogue and documentation of customer health sentiment

Live dialogue included in recurring meeting between client and account team

Rated from a score of 1-5, in five delivery areas

Reported to executive leadership team monthly to determine areas of continual improvements

Engagement model to discuss how our key stakeholders 'feel' about our overall service delivery

Customer Success Governance

Your Customer Success manager will own and manage all governance enablers



WEEKLY STATUS LOG & OPEN ITEMS

Best Practice weekly status/agenda, governance of ongoing open items by target due date, and tracking of client health sentiment



PROCESSING CALENDAR

Internal checklist to ensure all scheduled processing is completed timely, and facilitate cross training and team member changes over time



INTERNAL PLANSOURCE ADMINISTRATIVE GUIDE

Documented internal guide for all services supported – both standard and customized for each client



STANDARD SOPS & CLIENT CUSTOM SOPS

Active standard operating procedures and individual specific operating procedures for seamless support and to ensure alignment