

PLANSOURCE

Meet The Team



APRIL 26, 2024

One Source. Many Benefits.

Meet Your Team

Our solution is designed to optimize your entire benefits program, achieve greater engagement and participation in your benefits and point solutions, and deliver greater return on the investment you make in your benefits.

The PlanSource team is excited to discuss the successful partnership that is possible with PlanSource + White Cap

LEADERSHIP TEAM



Leslie Daricek
VP Customer Success



Steve Parkhouse
SVP, Customer Success

IMPLEMENTATION/CUSTOMER SUCCESS



Debbie Crittenden
Implementation Manager for
White Cap



T.J. Dubach
Sr. Customer Success Manager for
White Cap



Jennifer Wissler
Customer Success Leader
for White Cap

SALES



Bill Watt
Vice President, Sales



Daniel Morris
Regional Sales Executive



Dani Smith
Sr. Solutions Consultant

Steve Parkhouse
Executive Sponsor
Steve.Parkhouse@plansource.com

PlanSource Support Model for White Cap

Leslie Daricek
VP, Customer Success
Client Leader
Leslie.Daricek@plansource.com

Jennifer Wissler
Director, Customer Success (Ongoing)
Jennifer.Wissler@plansource.com

Debbie Crittenden
Sr Manager, Implementation
Deborah.Crittenden@plansource.com

Ongoing Support

★ **TJ Dubach**
Senior Customer Success Manager

Customer Account Analyst

Benefit Services

Contact Center Support
COBRA Administration
Billing Team
ACA Administration
FSA/HSA Administration
Dependent Verification Team
QMCSO Team
Communications & Total Rewards Team

Implementation

★ Project Manager
★ Benefit Consultant
Implementation Analyst(s)
EDI Project Coordinator

★ Your primary contact

LESLIE DARICEK

VP, CUSTOMER SUCCESS FOR WHITE CAP

Leslie Daricek, VP of Customer Success, is accountable for the successful delivery of Client Services, governance of ongoing delivery operations, and providing expert guidance for our best practice delivery models. Leslie has over 24 years of experience in the Health and Welfare industry leading organizations, where she has personally led large, complex implementations and requirements development for Fortune 100 companies. Leslie strives daily to achieve top accuracy in automation, provide exceptional service to the employees her clients trust her team to support, anticipate growth and scale needs for her partners, and ensure the team around her achieves their personal best.



STEVE PARKHOUSE

SVP, CUSTOMER SUCCESS FOR WHITECAP

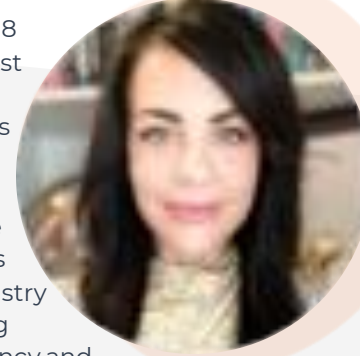
Steve joined PlanSource in 2021 as SVP of Client Services and brought over 20 years of experience to the team. Steve's vision for a successful service model is built on those 20 years of experience in the benefit administration, insurance broker and group benefit insurance industries. Steve oversees the PlanSource Client Services team for several channels including our Reseller, CORE and Premium channels. His knowledge and long term success strategy have solidified PlanSource a market-leader for client services within the Benefits Administration industry.



JENNIFER WISSLER

CUSTOMER SUCCESS LEADER FOR WHITE CAP

Jennifer Wissler joined PlanSource in 2018 providing lead service delivery to our most complex and intricate fully-outsourced accounts. Over the last four years, she has stepped into leading, training and mentoring a team of client success individuals to deliver best in class service across the organization. Her leadership is driven by experience, consulting on industry proven practices as well as implementing client governance measures for consistency and accountability. Her focus is largely on building partnerships that ensure relationships are long-term and mutually successful.



BILL WATT

VICE PRESIDENT, SALES

Bill Watt serves as the Vice President of Sales at PlanSource, bringing a wealth of experience and leadership to the role. With a proven track record in sales strategy and execution, Bill has played a pivotal role in driving PlanSource's revenue growth and market expansion. His expertise lies in developing and implementing innovative sales initiatives, fostering strong client relationships, and leading high-performing sales teams. Bill brings 15+ years of experience in benefits administration with most of his time spent at bswift and Wex Benefits. Bill is committed to driving strategic growth that meets the needs of our clients and key stakeholders.



DEBBIE CRITTENDEN

IMPLEMENTATION LEAD FOR WHITE CAP

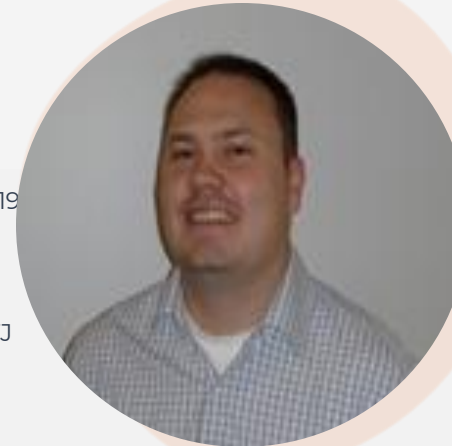
Debbie Crittenden is your Implementation Leader. She joined PlanSource in 2016 as an Implementation Specialist followed by Implementation Manager, where she implemented UKG's Core HRIS platform alongside our Benefits Administration platform. In 2021, Debbie moved into the Services Architect role and was promoted to manager of the department the following year. She is focused on supporting our Go to Market team in regard to all things Operations. With her deep knowledge of the PlanSource Implementation process and PlanSource Operations, Debbie helps explain the client experience, determine timelines, and assist with technical questions.



THOMAS DUBACH

SR CUSTOMER SUCCESS MANAGER FOR WHITE CAP

Thomas "TJ" Dubach has nearly 20 years' experience in the HR and Benefits industry. His areas of expertise include customer success, account management, exchanges, EDI, dependent audit, and implementation. TJ joined PlanSource in late 2011 as an account manager and immediately established a good rapport with his book of business. As Director from 2014-2019, TJ provided leadership to a newly organized business unit called Emerging Business Operations (EBO) and aided in creating structure for the team. That business unit laid the foundation for our current Sales Enablement and Product teams. In 2020 TJ returned to his PlanSource roots as a member of the account management/customer success team. TJ enjoys relationship building and solving customer challenges. TJ started in benefits as a member of ADP's Carrier Enrollment Services (CES) prior to joining PlanSource. At ADP TJ quickly became a subject matter expert of electronic data interchanges and premium billing services. His expertise garnered various technical and leadership roles within the CES department.



DANIEL MORRIS
REGIONAL SALES EXECUTIVE

Daniel Morris is the Regional Sales Executive for the Southeastern United States. He brings 12+ years of experience in the Benefits Administration industry across a variety of responsibility areas. Daniel started his career at Aon Hewitt/Alight where he demonstrated his ability to navigate and drive solutions for complex client challenges for many of the fortune 500. With experience building relationships, managing clients, implementing programs and consulting some of the largest organizations in the world, Daniel offers a strategic approach to each sale by working to solve each client's unique needs.



DANI SMITH
SENIOR SOLUTIONS CONSULTANT

Senior Solutions Consultant Dani Smith has worked within the go-to-market team since 2016. In this role, she is focused on 1,000+ employees in size and delivers a deep understanding of PlanSource's technology solution, which lends the ability of proactively being creative in helping prospective clients discover how they can elevate their overall Benefits Technology strategy. Prior to joining PlanSource, she started her career with Delaware Investments and then spent the prior 10 years in the insurance industry at The Guardian Life Insurance Company in sales and account management.

