

# CUSTOMER SUCCESS PACKAGES

## Ensuring Your Ongoing Success

Creating Wildly Successful Customers is one of our company's core values, and our Customer Success organization lives and breathes this every day. We realize not every team's needs are the same, so we offer three flexible options to ensure you get the right level of support you need to be successful.

|  | <b>ESSENTIALS</b><br>Best for small-mid-sized customers with straightforward benefits and low complexity | <b>COMPLETE</b><br>Ideal for medium-large customers that have more complex benefit needs and/or add-on services | <b>VIP</b><br>Designed for large, complex customers that need a full team to provide a tailored, high-touch approach |
|--|--|---|--|
| PlanSource University                  | ●  | ●   | ●  |
| Community Forum                        | ●  | ●   | ●  |
| Idea Portal                            | ●  | ●   | ●  |
| Known Issue Tracker                    | ●  | ●   | ●  |
| Online Knowledgebase                   | ●  | ●   | ●  |
| Technical Support                      | Shared team  | Designated Technical Support Manager  | Designated Technical Support Manager   |
| Benefit Configuration Support          | Shared team  | Designated Benefits Business Analyst as Needed  | Designated Benefits Business Analyst as Needed   |
| Integrations/EDI Support               | Shared team  | Designated Data Analyst as Needed   | Designated Data Analyst as Needed  |
| Annual Benefit Renewal and OE Planning | Online Guided Renewal Experience with Support as Needed  | Project Planning and Configuration for Annual Open Enrollment   | Project Planning, Consultation and Configuration for Annual Open Enrollment  |
| Proactive Consultation and Planning    |  |   | Designated Customer Success Manager  |
| Leadership Access                      | Defined Feedback Path to Management  | Defined Feedback Path to Management   | Designated Executive Sponsor   |

## Customer Success Packages

### COMPLETE

With the Complete level, your Technical Support Manager is your main point of contact and advocate throughout PlanSource. They have access to a team of Benefits Business Analysts and Data Analysts to address your unique priorities and needs throughout the year and especially as you plan and execute your annual open enrollment.

### VIP

With VIP, you'll get day-to-day technical support plus a designated Customer Success Manager who will ensure you're getting the most out of PlanSource. Your Customer Success Manager provides personalized and proactive consultation, based on your specific benefits needs and priorities. Together, you'll set goals and regularly review performance to continually optimize your program efficiency and ROI.

### ONE SIZE DOES NOT FIT ALL

Based on your size and what products and services you buy from PlanSource, we'll place your account into one of the above Customer Success packages. However, we know every customer has a unique benefits program and varying levels of comfort with technology. That's why we've made it easy for you to upgrade to a higher-touch package.

To upgrade from Essentials to Complete or Complete to VIP is \$10,000 annually.

To upgrade from Essentials to VIP is \$20,000 annually.



"Our Customer Success Manager works tirelessly and is readily available. During COVID I had to figure out how to furlough 5,000 employees and update their benefits. She went above and beyond and is by far the best I have ever worked with."

#### TAMMY VALLE

HR Director, The Meruelo Group