



The Age of Self-Service Renewal is  
Here!



# Agenda

1. Overview of Self-Service Renewal
2. Self-Service Renewal Walkthrough
3. Q&A





## Overview of Self-Service Renewal

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## *An Overview*

### Background Information

- In early 2018, PlanSource started development on Self-Service Renewal
- There were several key design criteria:
  - Give users more control during renewal
  - Provide them with exactly what they need, no more and no less
  - Create intuitive, easy to follow workflows
  - Present answers to commonly asked questions and access to Renewal Support

### Capabilities

- 80% of all renewals can be complete using Self-Service Renewal with minimal support
  - Focused specifically on Type 1 and Type 2 renewals
  - Type 3 renewals will require configuration help from Renewal Support
- PlanSource is building the capabilities to support Type 3 renewals and need your help to identify priorities for our roadmap

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## *Why Use Self-Service Renewal?*

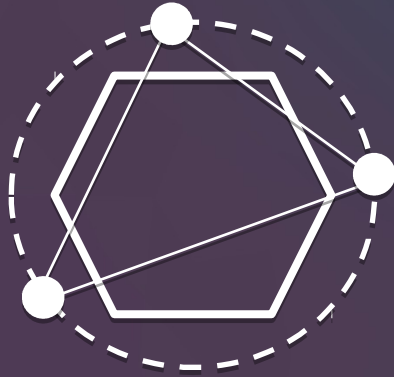
**HR  
Administrators**

**Partners**

- Give users more control during renewal
- Provide them with exactly what they need, no more and no less
- Create intuitive, easy to follow workflows
- Present answers to commonly asked questions and access to Renewal Support
- Introduce smart defaults to save time
- Renewal percent complete readily available to all users on new HR BenAdmin dashboard
- Continuously enhancing Self-Service Renewal and need your feedback to make it better than it is today

**Brokers**

**Resellers**



# Self-Service Renewal Walkthrough



# Q & A

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*One Last Thing...*

Stop by the **SPACE BAR** to try Self-Service Renewal out for yourself, ask questions, and get answers!

Review PlanSource University for Self-Service Renewal courses!



