

Your Simply Benefits Journey.

Implementation Plan

Welcome to Simply Benefits! This document will serve as a guide to all things implementation with Simple Benefits and will cover the following topics:

- ❶ What is the Simply Benefits Implementation Plan?
- ❷ Implementation Process, Breakdown & Timeline
- ❸ Contact Details and Additional Resources

Ready? Let's get started.

What is the Simply Benefits Implementation Plan?

You will have a dedicated Implementation Specialist who will walk you through every step of the platform, tailoring the training to your needs and providing additional support via email or phone outside of the scheduled meetings.

Our implementation plan is designed to ensure that you and your team have the training and resources necessary to successfully manage your Simply Benefits platform in just 4 weeks.

Understanding your goals and getting you to become a Simply Benefits Pro is our key priority. We know how busy your days can get so we will book meetings when it is convenient to you and your team.

The focus will always be YOU!

Your Implementation Process and Breakdown

The Implementation Process will consist of 2-3 meetings in a span of 1 month (depending on your availability) and during this time you will have:

- ✓ Unlimited email and phone support from your dedicated Implementation Specialist
- ✓ Live training sessions that will walk through every feature of your Simply Benefits platform including:
 - Adjusting Settings
 - Managing Employees
 - Plan Coverage & Breakdown
 - Generating Reports
 - Viewing Invoices
 - Managing Administrators
- ✓ Assistance with any questions and processes regarding yours & your employees' use of Simply Benefits
- ✓ The ability to provide feedback and propose features that would help improve your use of the Simply Benefits platform



Did you Know?

Our Implementation and Administration teams are always available for any questions or concerns that you may have during the implementation process. Your success is our top priority.

The Implementation Breakdown:

Session & Focus	Topics Covered	Details
Getting Started with Simply Benefits <i>One 30min session</i>	<ul style="list-style-type: none"> ✓ Understanding your Needs ✓ Platform Tutorial ✓ Enrollment and Rollout ✓ Adjusting your Settings ✓ Accessing Resources 	<p>First, in order to tailor the implementation process to your needs we will want to review and confirm your goals.</p> <p>Next, you will receive a full platform tutorial which will cover both the Admin and Employee portals.</p> <p>Following that, we will review how to adjust any settings within your account and how to access helpful resources.</p> <p>Lastly, you will learn how to enroll employees and how to send notifications to them.</p>
Employee Training (Optional)* <i>One 30min session</i>	<ul style="list-style-type: none"> ✓ Review the enrollment process ✓ Submitting Claims ✓ Review Plan Coverage and Usage ✓ Requesting Assistance 	<p>This session is for your employees. We will walk through the two ways to use Simply Benefits (desktop and mobile).</p> <p>Your employees will learn how to enroll, submit claims, review coverage, and view usage.</p> <p>We will also cover how to contact the Simply Benefits team for any assistance.</p>
Implementation Debrief & Ongoing Support <i>One 30min session</i>	<ul style="list-style-type: none"> ✓ Review anything Outstanding ✓ Gather Feedback on the Implementation Process ✓ Review any Platform Changes since the Getting Started Call ✓ Plan Next Steps ✓ Outline Ongoing Support 	<p>In our final session we will review any outstanding questions and build a plan of action.</p> <p>We will also gather your feedback on the overall process and any improvements that can be made and provide you with the resources you require for any future rollouts or submissions.</p> <p>Most importantly, we will outline your ongoing support so we can continue to lead you towards success!</p>

*PDF Resources will be provided to the Administrator that will cover everything the Employees need to know when using Simply Benefits. This call is optional and available if the Administrator wants the Simply Benefits Implementation Specialist to assist with training the group members.

As an administrator, you will also have the opportunity to schedule **1 additional impromptu meeting** alongside unlimited support via email or phone with your dedicated Implementation Specialist.

Have more questions? Contact Us!

Simply Benefits Contact Details

Plan Administration: administration@simplybenefits.ca

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