



## Consumer Driven Partnership Pledge

***Tell us what is important. We'll deliver or your money back.\****

We want our partnership to exceed your expectations. So we've listed the common performance measurements requested by our clients. Some of them are likely priorities for you, too. We'd like you to fill in the measurement standard that you expect in each of the categories. Then, in case we've missed any other important standards, there is room at the bottom for you to add your own standards and your expected measurement values. Once we've established our mutual expectations, we'll both sign the pledge, knowing exactly what we must do together to succeed. You will now fill in the framework of metrics with your own expectations of our performance.

### Client Partnership Pledge

Have the plan year loaded and ready no later than 7 business days after receipt of complete enrollment information.

(Participant access will be granted on the Plan Year start date.)

Have payment cards mailed to participants within 10 business days after the plan enrollments are loaded.

Maintain average customer service wait times of \_\_\_\_\_ minutes.

Respond to voice mails within \_\_\_\_\_ business hours.

Respond to email inquiries within \_\_\_\_\_ business hours.

Process requests for reimbursement within \_\_\_\_\_ business days of receipt of complete documentation.

Resolve \_\_\_\_\_ % of customer service inquiries on the initial call.

Process electronic files within \_\_\_\_\_ business day(s) of receipt.

Maintain system uptime availability \_\_\_\_\_ % of the time.

### Sample Metrics

1.5 minutes/wait time

8 business hours/voice mail

8 business hours/email

3 business days/reimbursements

80% resolution on first call

3 business days/processing

95% uptime



What other performance standards are important to you?  
Please write in the standard and the expected measurement value.

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**We'll perform the way you expect us to or you don't pay.\***



## Consumer Driven Partnership Pledge

We want to do the best possible job administering your group, but we can't do it alone. That's why we ask for your help by committing to us that you will provide us with the information we need to do our best job for you. Please initial next to each item to indicate your commitment.

- Actively participate in your implementation, including tracking progress and fulfilling requests through our online Client Success portal.
- Provide detailed plan information, including rates, group and carrier contacts and group numbers to WSI in a timely manner.
- Make every effort to ensure data and reimbursement requests provided to Workable Solutions are accurate and complete.
- Encourage participants to provide an email address for automated communications.
- Encourage participants to read plan education materials, view educational videos provided by Workable Solutions and use the online participant portal to manage their plans.
- Both parties pledge to make all interactions between us courteous and professional.
- Use the online secure communication link to report adds, terms and changes.
- Respond promptly to Workable Solutions when information is requested.
- Use the online employer portal to download scheduled management reports.
- Provide renewal plan changes and rates in a timely manner.
- Timely payment of invoiced fees.
- Send quarterly census to Workable Solutions for records updating.

By signing below, both parties are in agreement about the terms of the partnership.

|                                 |                     |
|---------------------------------|---------------------|
| _____                           | Signature _____     |
| Terry McCorvie, President       | Name & Title _____  |
| <b>Workable Solutions, Inc.</b> | Employer Name _____ |
| Date _____                      | Date _____          |

This document should be signed by the client and faxed to 407-540-1749 at the time when the proposal is accepted. Terry McCorvie, President of WSI, will then sign the pledge and it will be faxed back to the client.

### \*Money Back Guarantee

In performance of its duties, Workable Solutions, Inc. (WSI) will adhere to the performance standards set forth above. All standards are based on performance averages as measured within a calendar month period. Should Client believe WSI is out of compliance with any standards, written notice detailing such non-compliance will be provided to WSI. There shall be a 30 day period following the date of receipt of the notice during which WSI may either demonstrate the standard is in compliance or endeavor to correct the area(s) of non-compliance. Should WSI remain out of compliance at the end of the 30 day period for corrective action, monthly fees for the non-compliant product(s) shall be waived until such time as the performance standard is brought into compliance. WSI shall not be responsible for non-compliance based on incorrect, incomplete or non-timely information provided by Client.