



Next Generation Benefits Administration

PlanSource

Report Abstract

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12-pages

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Who is This Vendor Assessment For?

NelsonHall's Benefits Administration profile on PlanSource is a comprehensive assessment of PlanSource offerings and capabilities, designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of Benefits Administration Services and identifying vendor suitability for security services RFPs
- Vendor marketing, sales, and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the Benefits Administration Services sector.

Key Findings & Highlights

This NelsonHall vendor assessment analyzes PlanSource's offerings and capabilities in Benefits Administration Services.

PlanSource, headquartered in Orlando, Florida, is a private company owned by Vista Equity Partners and dedicated to employee benefits technology and services. It focuses on H&W benefits. It was founded in 2008 by technology veterans to modernize how companies manage benefits and how employees gain access to benefits. It is dedicated to H&W and in 2010 launched proprietary IP, PlanSource Ben Admin. It has primarily grown its business by increasingly investing in its technology, where 94% of its business in 2021 uses its own software.

Scope of the Report

The report provides a comprehensive and objective analysis of PlanSource's Benefits Administration Services offerings and capabilities, and market and financial strengths, including:

- Identification of the company's strategy, emphasis, and new developments
- Analysis of the company's strengths, weaknesses, and outlook
- Revenue estimates
- Analysis of the profile of the company's customer base including the company's targeting strategy and examples of current contracts
- Analysis of the company's offerings and key service components
- Analysis of the company's delivery organization including the location of delivery locations.

Next Generation Benefits Administration Assessments

also Available for:

ADP

Alight Solutions

bswift

Conduent

Empyrean

LifeWorks

Mercer

PlanSource

About The Author

Liz Rennie is the HR Technology and Services Research Director with global responsibility for key HR research projects, including Cloud HR Transformation, Benefits Services, and Payroll, as part of NelsonHall's wider HR Technology & Services practice.

In this key role, Liz assists both buy-side and vendor organizations in evaluating opportunities and capability to support HR and benefits transformation through deploying cloud-based services and redesigning HR service delivery to leverage the latest technologies offered by mobile, AI, blockchain and robotics.

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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., and Continental Europe, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. And for vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research, and is widely respected for the quality, depth and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

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