MercerMarsh Benefits

DARWIN

Account Management Service Description

Introduction

Within this document you will see an overview of how your Account Manager will work with you as a Darwin Client.

Scope of Service and Responsibilities

Building a solid partnership with you is at the core of our Account Management model. We cultivate deep relationships to ensure we fully understand your requirements and align your personal and team goals with your wider business needs.

Topic	Client Responsibilities	Owner
Business Review Meetings	Attend and participate in regular Business Review meetings.	Darwin
Statements of Work & Sign Off	Nominate an owner for sign off for any change management.	Darwin
Roles & Responsibilities	Provide an organisation chart and roles and responsibilities to your Account Manager to enable alignment with the Darwin team, clear expectations and paths of escalation.	Mutually Owned Darwin & Client
Strategic & Annual Planning	Maintain a planned changes calendar, to enable the Darwin team to plan for your change requirements. This will be agreed at a high level 12 months in advance and reviewed against your business needs during our quarterly business reviews if not more frequently.	Mutually Owned Darwin & Client
Success Metrics	Agree with your Account Manager the metrics that enable us to measure success, for review in Business Review Meetings.	Mutually Owned Darwin & Client
Change Management Requests & Requirements Gathering	Nominate owners for Change Request submission. Any changes to Darwin post launch will need to be requested by your operational owner using the Darwin Change Management request form and submitted onto our online tool for validation by your Account Manager.	Client
Client Satisfaction	We ask you to agree contacts for the regular Client Experience Survey and provide a score and feedback when requested on a bi-annual basis. You will also be contacted in relation to your interaction with us to ensure we are gathering timely feedback on our services.	Client

Account Manager

During the sales process our acquired understanding of your needs as a client will help us assign an Account Manager, who will become your long-term business partner.

Your Account Manager is your primary contact who will work with you to ensure that we are delivering aligned to the services within your contract and partnering to support you achieve your objectives and goals relating to the Darwin Benefits Software.

Your Account Manager will focus on making sure that Darwin fits the strategic vision of what you want to do with your benefits programme, your wider people strategy, and ultimately your business as a whole. They work with you to understand your objectives, agree activities that will help you achieve those objectives and measures to prove the value and success of Darwin. This will form part of our ongoing Account Plan and be monitored through regular business reviews and touch points to ensure that you are delighted throughout the duration of your contract.

Acting as your ambassador your Account Manager will make sure you get the most out of the Darwin relationship and the wider MMB partnership.

Details on the deliverables that support and underpin this can be seen in the Scope of Service and Responsibilities below. They will be responsible for:

- Agreeing defined criteria of what success looks like, and how we can measure progress and achieve your goals;
- Translating your goals into tangible actions for the Darwin Service and Delivery Teams;
- Identifying and bridging any gaps that you have at present, in order to realize your goals;
- Measuring progress against the agreed criteria, ensuring we stay mutually focused on what you need to achieve;
- Communicating best practices in the deployment of Darwin and our Roadmap;
- Giving you market and industry thought leadership;
- Providing service reporting on performance against our contractual SLA commitments
- Provide insights around Employee utilisation and engagement with Darwin;
- Providing analysis on operational matters and identifying areas for improvements – through provision of analysis on Ticket volumes and Change Requests managed through our managed services and In-Life support teams;
- Point of escalation

Helping you achieve your goals

Throughout the course of your journey with us, you can expect a series of key responsibilities and deliverables from your Account Manager to ensure that we are mutually progressing our partnership.

Clean Handover

Focused on clear understanding of your motivations for purchase, and smooth transition from sales into your journey as our client. As your ambassador internally, your Account Manager will also ensure smooth handovers back into project, for example during your annual Enrolment period.

Account Planning

Account Planning is focused on understanding your business objectives, identifying how Darwin can support you and putting in place a dedicated plan to realize these goals.

Business Reviews

Regular Business Review meetings are key for us to focus on understanding your business and ensuring you know how to maximise our partnership, in order to get demonstrable return on investment from Darwin.

These sessions which would typically run on a half yearly or quarterly basis give an opportunity for us to keep Up To Date on developments within your business and how this may affect your benefits strategy and delivery. It allows us to understand, and plan for, work or projects that you are planning, and work with you on any challenges you may be facing, discuss solutions and ensure project are resourced at the right times. The business reviews are also an opportunity for us to share developments across the MMB business including the Darwin roadmap and access to wider Mercer thought leadership. We also use these as a touch point to review our Account Plan, track any key wins and successes and help you to report back the value that is being provided through the Darwin technology and your wider Mercer relationship.

Facilitating Darwin Service and Delivery

Your Account Manager will direct operational teams to ensure they are focused on what is important to you on a macro level. They will plan change with you, engage with the resource allocation process for projects, and translate your requirements to experts, acting as first triage to best support your needs. They will engage with you on the best practice ways of working across our business and ensure you are clear on our account governance and know who to contact for what.

Change Management

We are committed to supporting you through changes that need to be reflected on Darwin.

Your Account Manager will collaborate with you on change management planning. This will include a 12-month plan of major changes or Benefit Selection Windows that you are planning on Darwin, so that we can ensure you have access to the relevant experts and resource at the right times.

We will ask you to complete an online Change Request Form to enable you to start the Change Management process. Your Account Manager will be responsible for enabling you on this process, working with you where needed, and also providing access to relevant Darwin experts during the scoping phase of change management, as well as issuing any commercial agreements relating to your requested changes.

Governance and escalation management

During the partnership, a named Client contact person is needed per region, to work alongside your Account Manager as an escalation point.

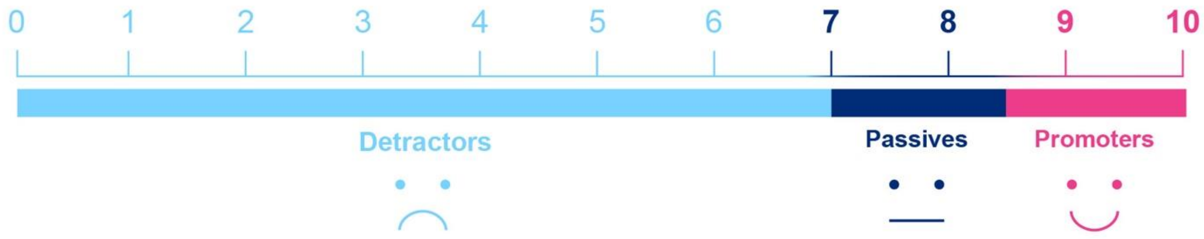
We will work together to create a combined organisational chart, matching your team to their counterparts within Darwin for overall account management and governance. This will cover both the relationship and operational roles and give clarity on responsibilities.

In addition to this, we have clear escalation paths within each team, as defined within the relevant service descriptions.

Client Experience Surveys

As part of MMB Multinational, we will look to include you within the half-yearly Client Experience Survey, for feedback on all services provided by Mercer for your employee benefits including GBM (where relevant) and Darwin. The survey makes use of the Net Promoter Score (NPS) survey method, we benchmark client satisfaction and experience on Darwin and related client service on a half-yearly basis and use the results to drive improvements across our business.

Within this survey, we will contact all our regular stakeholders and ask you to rate Darwin overall on a scale of 0-10. Based on your score, you will be classified as either a Detractor, Promoter or Passive.



You will then be able to score the Individual teams, who you interact with. Your additional feedback will help us:

- Pinpoint any specific pain areas
- Put the most effective solutions in place more quickly
- Take business-wide action to improve your client experience

To get the most from this feedback loop, we encourage as many of your team as possible to engage and provide feedback through the survey.

We also offer other in-the-moment opportunities for you and your team to provide feedback on more specific activities, such as on completion of your Business Review or Stewardship meetings.

Operating Hours

Operating hours of our Account Management Team are the normal business hours in our three regions:

- 0900 to 1730 GMT/BST (UTC/UTC+1) for clients in Europe, Middle East and Africa and the Americas.
- 0900 to 1730 SGT (UTC+8) for clients in the Asia Pacific region