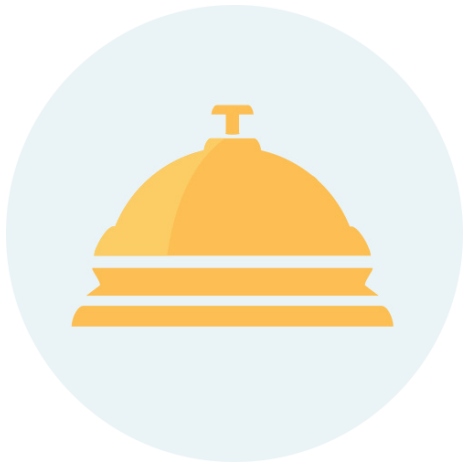# Maxwell | Health™

Value of Customer Success Support

In a time when you're expected to do more with the same (or less) resources at hand, Maxwell's partnership model means you don't have to staff up an extra team of people to implement or service your deployed clients ongoing.

Think of Maxwell's Customer Success team as an extension of your own, empowering you to delight your clients and free up time to focus on consulting with your clients.

›View the Full Platform Overview

SUPPORTING YOUR SUCCESS

Commitment to your Success:

› Your **assigned Account Manager** is responsible for your success with Maxwell, both tactically and strategically, working with you to understand your strategy with Maxwell and drive adoption and growth of your business through the power of our technology. With regular status calls, quarterly planning meetings, and dashboards delivered to you on a recurring basis, you will also be exposed to our Marketing, Marketplace and Sales resources as needed. They are an advocate for any product enhancements that are important to you, working with our Product Management and Engineering team to translate those needs into action.

› Hands-on **Implementation Consultants**, technical experts in employer portal configuration, are available to support you through every client deployment, renewal or portal change as needed via phone, chat, and e-mail.

› Ongoing **webinar-based Administrator training** modules from our Product Specialist team, who are subject-matter experts on administering and managing benefits via Maxwell's platform

› Post-go-live **Technical Support Contact Center** is available via phone and email from our US-based team, and our online self-service help centers and knowledge bases help your team, your clients' Administrators, and their employees get the most out of Maxwell

One-on-one Launch Services and Setup: Your Maxwell team leads your agency through customized Sales and Marketing trainings to get your team up to speed and equipped with what they need to be successful with Maxwell, and provides hands-on support for your initial client implementations.

Access to the **Maxwell Clubhouse**, an exclusive online community providing avenues for product feedback and early previews, peer-to-peer support, and more*

Available with our Enhanced package

Maxwell | Health

MEET TEMPO!

Tempo is your revolutionary web-based implementation toolset, proprietary to Maxwell. Tempo's built-in Portal and Census Assistants makes sure that your employers are deployed swiftly on Maxwell with clean and error-free data. These Assistants run thousands of validation tests in the background as you build out your client's portal, and progressively get smarter with each employer deployed on Maxwell.

Think of the efficiencies you'll gain with one centralized capture tool and these handy Assistants as your guiding beacons: no more of the back-and-forth or manual review that's required on other benefits administration systems.

> **Watch a short video on Tempo**

Here's how deploying your clients works:

Maxwell Wrap-up and
Quality Assurance

Advisor Implementation
in Tempo

5
BUSINESS
DAYS

Advisor Review

HR Training and
Portal Launch

The Portal Assistant in Tempo

Your Portal Assistant serves as a modern, intuitive, and automated guide whose job it is to constantly check your work for completion and accuracy along the way.

A   Auto-saves every second

B   Alerts you if something is wrong

C   Provides helpful tips towards reaching a completed build

D   Ensures all fields get completed correctly during each step of the process

E   Built-in validation not only highlights errors that must be corrected, but also warns you when there's a configuration that should be double-checked

F   Satisfies your inner-achiever by allowing you to easily track your build progress on every screen

G   Finally, the Portal Review summarizes all findings of the Portal Assistant on one screen for easy review

H   Provides an output summary that displays all information you've inputted in a clean, organized fashion that you can download or print

The Census Assistant in Tempo

The Census Assistant is a total game-changer for your implementation process: turning one of the most complex and error-ridden steps into one of the easiest! A simple upload of your employer census will map to the products you've set up within Tempo, and the Assistant guides you through any necessary or suggested corrections to get on your way to a live employer portal.

A Allows you to import employee information, including their benefit elections, or update existing employees in bulk if needed

B Works in the background to validate against potentially thousands of different scenarios, eliminating the risk of human error that accompanies a manual review

C Not only summarizes and displays any errors that need to be corrected, but also highlights and identifies warnings

   i These are potential discrepancies we recommend you review for accuracy before completing your upload.

   ii Specifically indicates the rows, columns, and cells with potential issues, and makes suggestions for the fix

The end result: a census you can feel confident is totally error-free before it even enters the system.

A

Upload Census

B Errors (2)

🐞 **Employee needs a first name**
First name is required for import.

Row: 3, Employee: Brown

TEMPO — Abbie's Tempo Demo Portal

Portal Overview
1. Basic Information
2. Eligibility Groups
3. Products
4. Census
5. Portal Review

CENSUS

Now let's get all of the employee information into t[he]
upload the completed file. Once the upload is comple[te]
records. Correct any errors on your original file, and upl[oad]

Census Tools

Step One: Download our census template file. When you open the file in Excel, be sure to click "Enable Macros" if that option appears.

Download Census Template

Step Two: After you've entered information for all employees, click "CONVERT" on the left-hand side of the file to convert the file into .CSV format. You can then upload the completed .CSV file to Tempo.

Upload Census

Step Three: Once the upload is complete, the Census Assistant will display errors and warnings. Correct any errors on the .CSV file and upload the updated version by clicking "Upload Census" above.

Need Help? Read the how-to on our Advisor Knowledge Base.

CENSUS ASSISTANT   [BY ROW]

Errors (2)

🐞 **Employee needs a first name**
First name is required for import.
Row: 3, Employee: Brown

🐞 **Enrollees must match the product's coverage level**
This column is required ONLY if dependent children are listed on this census, but NOT all dependent children listed are enrolled in this product. If completing this column, list those that are enrolled (including employee).
Row: 12, Col: BD, Employee: Caroline O'Brien, Medical Product: Anthem BlueCross 2500 2016, Medical Plan Coverage Level: ee/sp

Warnings (2)

⚠ Employee does not have a valid street address.
Street address is either missing or contains a "#".
Row: 2, Col: K, Employee: John Sanchez, Address1: 10 Holly Lane#

⚠ Employee has a dependent(s) listed that has not been listed as covered members under any product
Row: 6, Col: BD, Employee: David Delgado, Medical Product: Anthem BlueCross 2500 2016, Medical Plan Coverage Level: ee+sp+ch

Passed (62)

✓ Employee needs a last name
Last name is required for import.

✓ Employee's email address matches another record on the file

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C Warnings (2)

⚠   **i** **Employee does not have a valid street address**
Street address is either missing or contains a "#".

   ii Row: 2, Col: K, Employee: John Sanchez, Address1: 10 Holly Lane#

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