



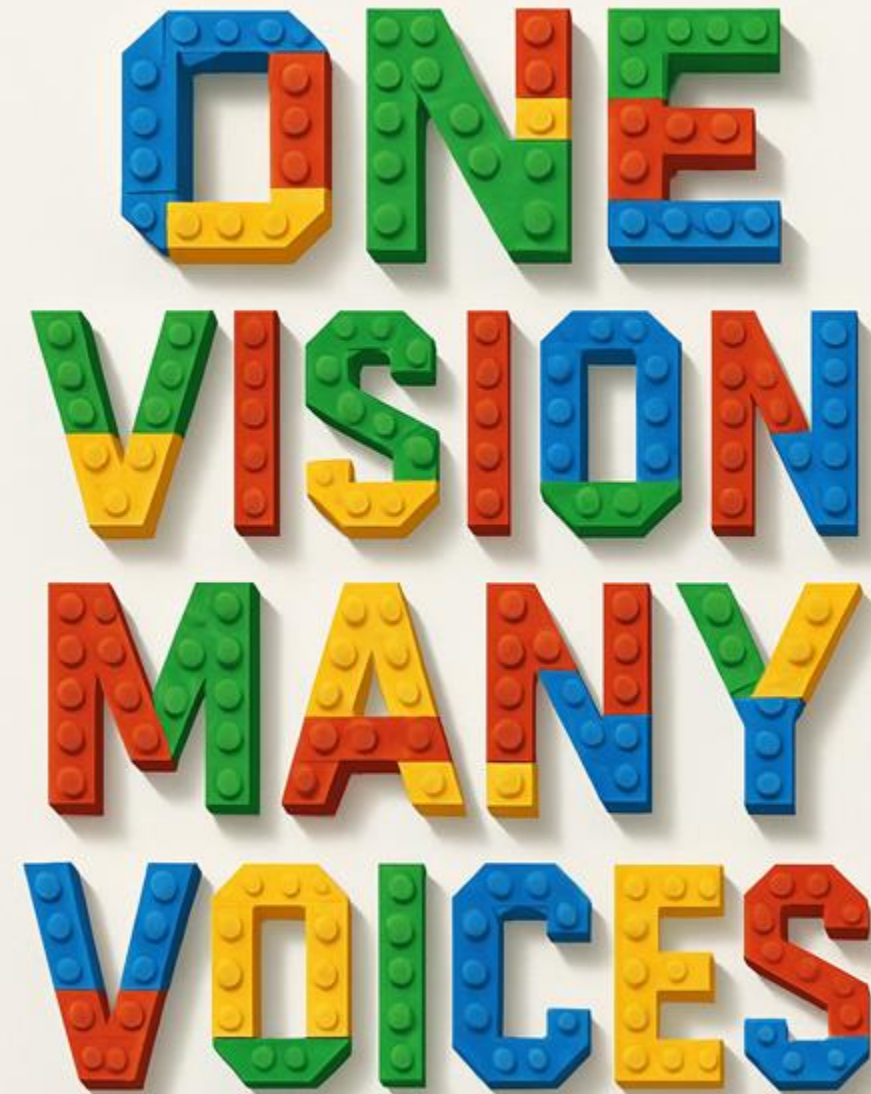
Monday, September 8

# Purpose in Action : Living Our Values Through Service

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**Sandra Zarate**

PST: 8:45 - 9:30 am | EST: 11:45am - 12:30 pm | IST: 9:15 - 10:00 pm





**Purpose in Action:**  
Living Our Values Through Service

# Why Service Matters

## Case Studies:

- You don't have coverage but...
- Not Karate Kid, but COBRA Kai
- What invoice?
- Mind, body & soul
- United by purpose



# The Ripple Effect

## Sales

Builds early trust, customizes solutions and creates a smooth transition into onboarding

## Marketing

Educates, drives engagement and ensures a clear understanding of our value

## Implementation

Ensure a seamless setup, clear communication and a strong foundation for success

## Service

Provides timely, empathetic help that directly affects satisfaction and trust

## IT

Powers reliable, user-friendly tech experiences and supports secure data integrations

## Finance

Maintains trust through accurate billing and financial transparency

## Compliance

Protects our reputation by ensuring regulatory alignment and data security

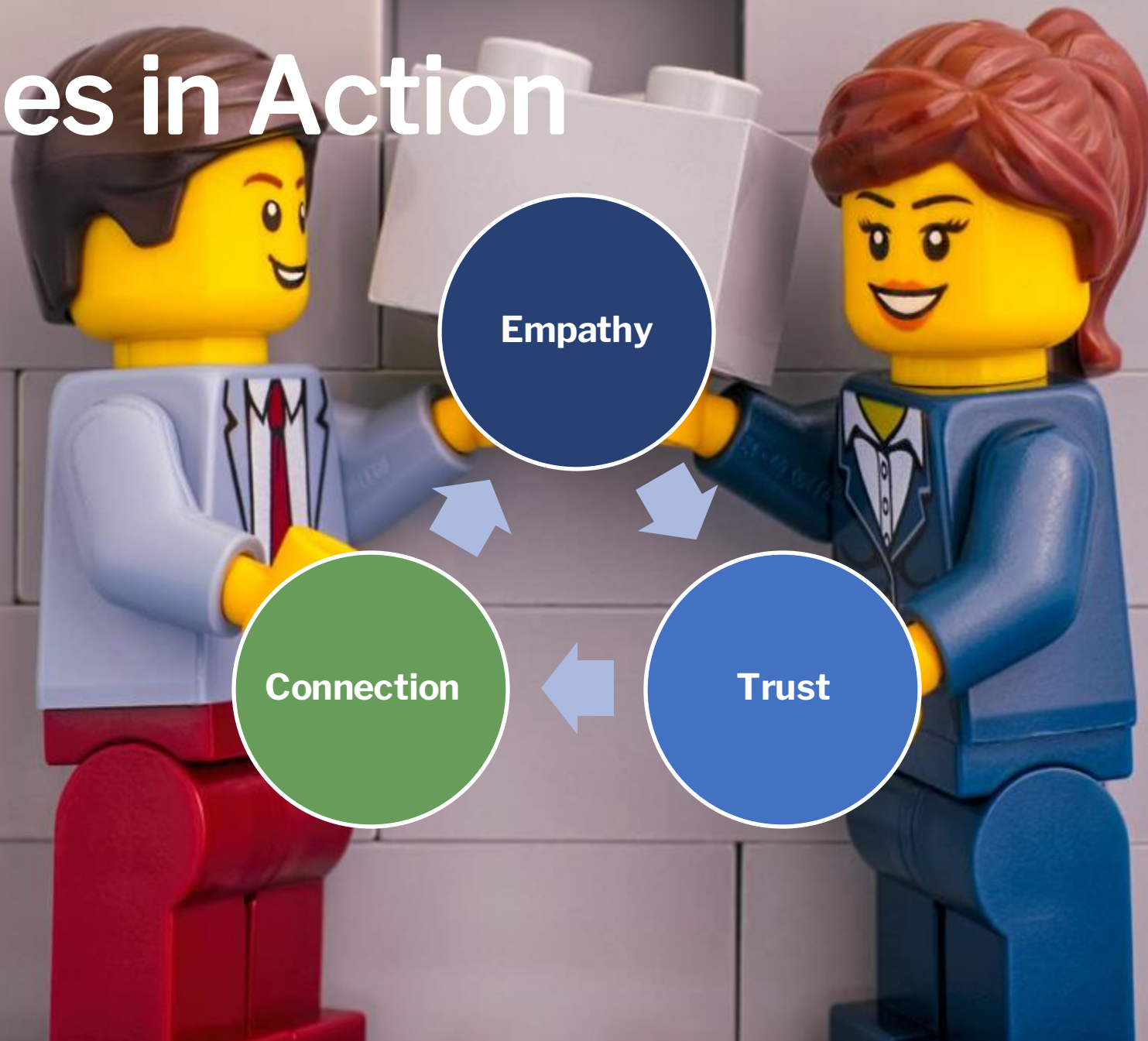
## Strategic Initiatives

Drives innovation and long-term improvements to better serve customer needs





# Values in Action



# Feedback from Our Clients!



WE ASKED OUR CLIENTS AND BROKERS





Broadening Our Impact



# Recap and Takeaways



- ✓ ☐ Service is not a department, it's a culture
- ✓ ☐ The #1 metric that matters to those we serve is their service experience with Clarity as a whole
- ✓ ☐ **YOU can bring the service mindset** into action right now!

## Ask yourself:

How can I show up with more empathy this week?

Where can I build more trust—in my team, with a client, or even in myself?

And how can I turn connection into impact, right where I am?



THANK YOU