

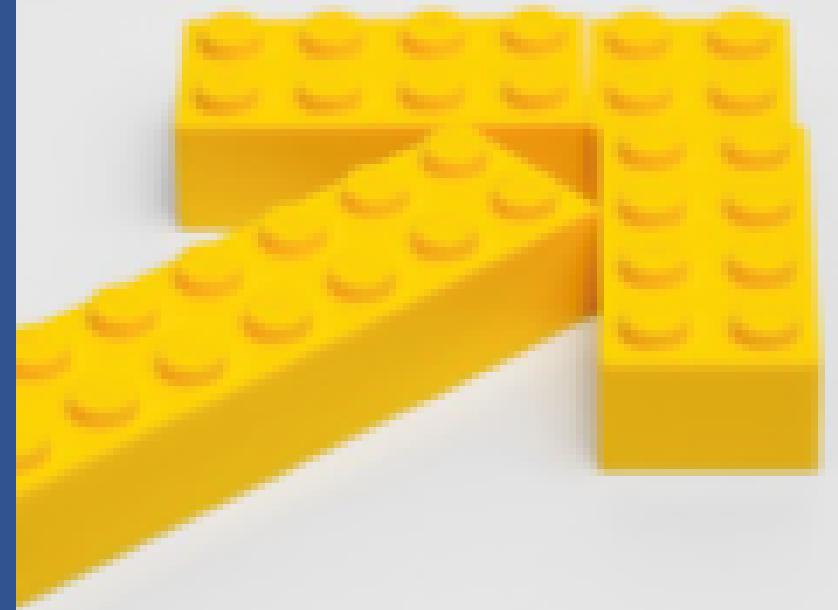


Tuesday, September 9

Your Path, Your Future: Growing with Clarity

Iris Negron and Lauren Lamprecht

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



Understanding Career Pathing

What is Career Pathing?

- Helps employees map out their potential growth at Clarity.
- Identifies the skills, experiences, and milestones needed to move from one role to the next.
- Provides a clear view of opportunities across departments, geographies, and levels.
- Acts as a two-way conversation between employees and leaders about goals and support.
- Serves as a guide for professional development and connecting learning to advancement.

Why Does Career Pathing Matter?

- Ensures every employee can see a future at Clarity, whether they are in the US or India.
- Aligns individual growth with Clarity's mission of delivering Simply Smarter service.
- Supports Clarity's culture of continuous learning, advancement, and recognition.
- Builds employee loyalty and retention by showing Clarity invests in long-term careers.
- Encourages cross-team and cross-country opportunities, fostering a truly global workplace.

Empowering Growth Through Career Pathing

Benefits to Employees

- Creates a clear roadmap for growth so you can envision your future at Clarity.
- Encourages skill-building and continuous learning to expand your expertise.
- Builds confidence and motivation by showing that advancement is possible.
- Empowers you to own your career journey with support from leaders.
- Opens new opportunities across roles and departments, broadening your career options.

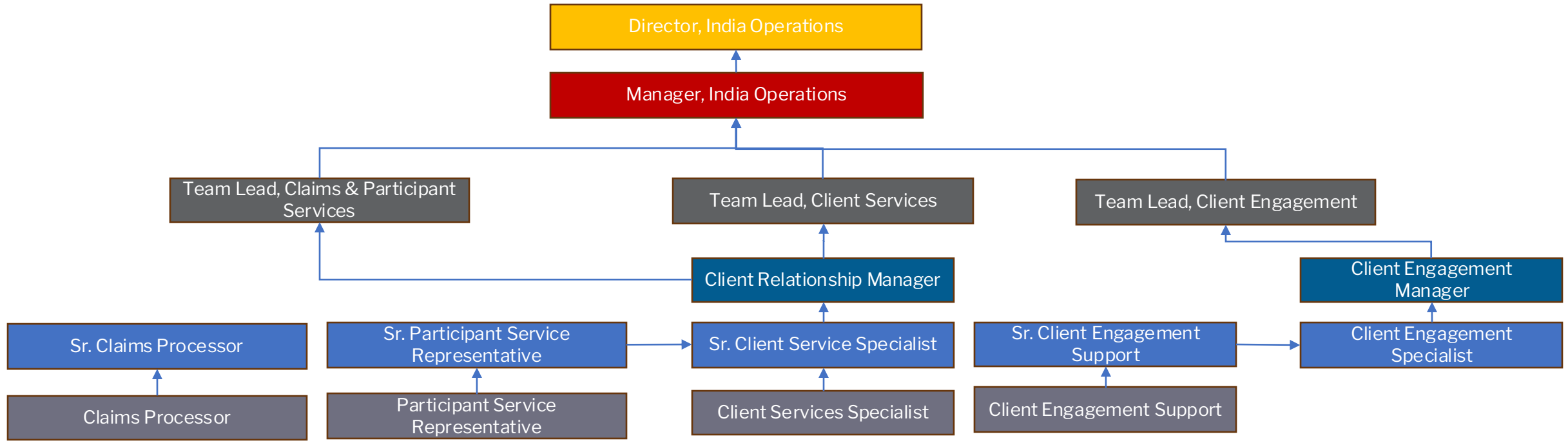
Benefits to Clarity

- Strengthens employee engagement and retention by investing in long-term careers.
- Ensures Clarity grows future leaders from within, creating stability and consistency.
- Promotes collaboration across teams and geographies by opening new opportunities.
- Fuels innovation and service excellence through a motivated, forward-looking workforce.
- Demonstrates Clarity's commitment to employees' success.

Clarity Context: Why This Matters Now

- Growth and career pathing are **central to Clarity's culture**.
- Clarity's **U.S. employees** (55+) consistently share how vital growth opportunities are to their engagement.
- Clarity's **India employees** (100+) made it clear during interviews that career pathing was a key reason they chose Clarity.
- This is the **first Summit that includes India employees**, a milestone in Clarity's global journey.
- Celebrating **one year in India**, Clarity underscores its commitment to global growth.
- Employees want to see **transparency in opportunities** and a clear path forward, career pathing delivers that.
- Career pathing ensures **equal access to opportunities** across both US and India teams, reinforcing fairness and transparency.
- Providing career paths helps **retain top talent** and reduces the need for external recruiting.
- Career pathing **strengthens leadership development** by fostering talent that understands and lives by Clarity's values and mission.
- This moment reinforces Clarity's identity as a **global company that invests in people**

Sample Career Pathing Plan



Eligibility Criteria for Promotions

- Candidate must have 18–24 months in current role with an end-to-end understanding of company products, services, and systems to support all aspects of product administration.
- Candidate must at least “meet expectations” in the last two quarterly performance assessments.
- Candidate must meet all individual performance goals with no active

	Level 7
	Level 6
	Level 5
	Level 4
	Level 3
	Level 2

Participant Services Representative

0-2 Years of Experience

Responsibilities

- Answer participant phone calls and respond to emails in a courteous, empathetic, and accurate manner, ensuring each interaction leaves the participant feeling supported and heard.
- Document all communication and call outcomes thoroughly in Salesforce to ensure a seamless transition if additional support or follow-up is required.
- Educate participants on the fundamental aspects of their benefit accounts, including how to submit claims, use their debit cards, and navigate the portal.
- De-escalate participant frustrations by listening attentively, acknowledging concerns, and resolving the issue or directing it to an appropriate team member.
- Maintain up-to-date knowledge of regulatory requirements such as HIPAA to ensure participant data is handled securely and confidentially.
- Participate actively in training programs and quality assurance sessions to continually improve service delivery and product knowledge.
- Monitor call queues and adhere to scheduling commitments to maintain service levels and call center productivity standards.
- Identify common trends in participant inquiries and communicate them to leadership to support process improvements or system enhancements.

Key Skills

- Strong customer service orientation with the ability to remain composed and professional under pressure.
- Attention to detail when documenting cases and interpreting benefit information.
- Time management skills to navigate high call volumes without compromising quality.
- Team collaboration and flexibility to adjust priorities based on business needs.
- Ability to recognize and escalate potentially sensitive or high-risk issues.
- Willingness to learn and apply complex benefit concepts through ongoing training.
- Proficient in using multiple systems simultaneously to research and resolve participant inquiries efficiently.
- Demonstrates empathy and active listening to build trust and rapport with participants during each interaction.

Senior Participant Services Representative

1-2 Years as a PSR or in a Similar Role

Responsibilities

- Manage and resolve high-complexity participant inquiries, such as denied claims or escalated reimbursement issues, requiring a nuanced understanding of benefit plans and compliance regulations.
- Provide mentorship and side-by-side support to junior PSRs, guiding them through difficult scenarios and reinforcing best practices in customer engagement.
- Take the lead in identifying and documenting process gaps or participant pain points and recommend enhancements that improve operational efficiency.
- Conduct training refreshers or knowledge shares to ensure the team stays updated on product changes, platform updates, or recurring service challenges.
- Monitor personal service performance as well as junior team member trends, providing informal feedback or suggestions to management as needed.
- Partner with cross-functional teams to ensure escalated participant issues are resolved quickly and accurately.
- Review and audit peer case documentation to promote consistency and accuracy.
- Act as a backup to the Manager when necessary, handling urgent issues or workflow redirection in their absence.

Key Skills

- Deep knowledge of employee benefits (i.e., HSAs, FSAs, LPFSAs, HRAs, DCAs, SmartRide, and Clarity Complete), compliance requirements (i.e., COBRA, Direct Bill, ERISA, and POP), wellness programs (i.e., SimplyWell), and benefits administration, with the ability to apply this expertise to real-world participant scenarios.
- Deep knowledge of Clarity platforms and systems (i.e., Amazon Connect, Salesforce, Bswift, Alegeus, WCC, Clarity Portal, and the mobile application), with the ability to apply this expertise to real-world participant scenarios.
- Advanced de-escalation and conflict resolution techniques.
- Leadership and informal coaching abilities to support peers.
- Analytical mindset for identifying patterns in participant inquiries.
- Strong written and verbal presentation skills for leading internal training.
- Flexibility and initiative in addressing evolving participant needs.
- Excellent interpersonal skills to foster collaboration across departments.

Client Services Specialist

1-2 Years as a Senior PSR or in a Similar Role

Responsibilities

- Support Client Relationship Managers in the execution of client plan implementations and renewals by preparing data, reviewing setup configurations, and ensuring system readiness.
- Investigate and resolve client-side benefit enrollment discrepancies.
- Coordinate with vendors, internal systems teams, and brokers.
- Manage the submission and lifecycle of platform service tickets for technical issues or enhancement requests to ensure timely resolution and transparency.
- Deliver clear and effective product training to clients and brokers through scheduled webinars or recorded materials to support understanding and engagement.
- Accurately maintain Salesforce records for client cases and configurations, ensuring that audit readiness and internal reporting standards are met.
- Support Finance with billing queries from clients by researching remittances, reconciling balances, and facilitating refund processes.
- Contribute to departmental projects that drive workflow improvements or service innovations, such as automating manual processes or piloting new systems.
- Collaborate with internal stakeholders to troubleshoot complex administrative challenges that affect multiple clients.

Key Skills

- Detailed working knowledge of consumer-directed benefits administration processes.
- Advanced troubleshooting abilities, especially across benefit systems.
- High accuracy and consistency in CRM platforms like Salesforce.
- Presentation and training delivery skills for client audiences.
- Proactive issue resolution with minimal supervision.
- Strong collaboration and follow-up with cross-functional teams.
- Comfort navigating finance and billing documentation.
- Operational knowledge of administrative platforms and vendor ticket systems.
- Effective time management and prioritization in a fast-paced environment.
- Strong interpersonal skills with the ability to build client trust and rapport.
- Adaptability and resilience in response to shifting client or business needs.
- Clear and professional verbal and written communication across all levels.

Client Relationship Manager

1-2 Years as a CSS or in a Similar Role

Responsibilities

- Serve as the primary point of contact for assigned clients and brokers, delivering high-touch service that anticipates needs and ensures satisfaction throughout the client lifecycle.
- Lead the day-to-day client relationship across multiple touchpoints (i.e., renewals, escalations, reporting, and special projects).
- Monitor and manage a personal queue of cases and tasks to meet turnaround time expectations, with a strong focus on quality and timeliness.
- Partner with Client Services Executives to oversee setup and maintenance of client plans during open enrollment and onboarding, offering strategic insight on best practices and system optimization.
- Conduct proactive outreach and quarterly health reviews with clients and brokers, identifying opportunities to improve engagement and expand service adoption.
- Collaborate closely with Finance on remittance calculation, invoice discrepancies, and resolution of billing-related escalations.
- Escalate high-priority issues internally and coordinate cross-functional response strategies to minimize client disruption.
- Continuously gather client feedback, document enhancement requests, and participate in system development reviews to influence future functionality.

Key Skills

- Expert understanding of Clarity's full product portfolio and system platforms.
- Strong client relationship management and communication across levels.
- Excellent time and task management across a high caseload.
- Ability to synthesize technical, financial, and regulatory information.
- Professional presentation and meeting facilitation skills.
- Strategic thinking and problem prevention.
- Deep collaboration with cross-functional teams and internal SMEs.
- Salesforce and benefits platform data fluency.
- Emotional intelligence and active listening to strengthen client engagement.
- Resilience and professionalism when navigating challenging client dynamics.
- Growth mindset with openness to feedback and continuous improvement.
- Empathy and diplomacy in resolving client concerns with care and urgency.

Showcasing Career Pathing in Action

Employee Testimonials

Coral Shorts

“My time as a Client Service Specialist has been an incredible journey that challenged me to grow both personally and professionally. I had the opportunity to learn from some truly talented colleagues and gain hands-on experience that pushed me out of my comfort zone in the best way. Those experiences have shaped how I approach problems and collaboration today. In my new role, I feel excited to keep building on that foundation and continue learning every step of the way.”

Jodrell Thompson

What a journey it's been at Clarity! Looking back, I'm amazed by how much I've grown—both professionally and personally. This team has been an incredible source of learning, teaching me the power of collaboration, the value of open feedback, and the importance of adaptability in the face of change.

As I step into my new role in Client Services, I'm excited and grateful for all I've learned. Working closely with clients has been so rewarding, and each outreach brings new challenges that help me refine my skills. I'm excited to keep making a real impact and continue growing in this next chapter.

Victoria Hunt

"My experience with Clarity has been great, especially because they promote from within, which helped me grow quickly in just 10 months. What sets Clarity apart is how much they genuinely care about their employees — you're not just a number here. Being part of a real team brings a strong sense of belonging and support. Leadership and my teammates have been phenomenal throughout my journey. Clarity empowers you to grow, step out of your comfort zone, and become the best version of yourself."

Employee Testimonials

Darion Sarboukh

Being a part of Clarity has been an incredible experience! I've gained a wealth of knowledge, which has prepared me for further opportunities. Most importantly, I could not value the culture more! Clarity provides a strong sense of inclusion, support, and collaboration.

I've recently stepped into a new role, which has been an incredible experience with a seamless transition! This role has allowed for a combination of both personal and professional growth as well as a deeper dive into industry knowledge. I am honored to have the opportunity to make an even bigger impact on Clarity's success as a company!

Jessie Lahr

I am truly grateful for the opportunity to be a Client Engagement Manager at Clarity. I've learned so much from my colleagues over the past three years, and I deeply appreciate the guidance and mentorship from my supervisor. I'm eager to keep growing and take on new and exciting challenges in this role.

Erin Fife

I started my career with Clarity Benefit Solutions as a Participant Services Representative approximately one year ago and transferred over to the Client Services - COBRA team in early summer. My experience as a PSR gave me the knowledge and confidence to navigate my new position. I am really enjoying the research and writing aspects of being a CSS!

Tools and Resources to **Support Your Growth**

- **KnowledgeCity (LMS):** Access to self-paced courses, certifications, and role-specific training that build the skills needed for advancement.
- **Coaching and Mentorship:** Guidance from experienced leaders and peers who provide feedback, career advice, and support.
- **Job Shadowing:** Opportunities to observe and learn from colleagues in different roles, gaining hands-on insight into future career paths.
- **Cross-Training Opportunities:** Projects and assignments that help employees expand their knowledge across departments and strengthen collaboration.
- **Performance Journals and Check-Ins:** Regular conversations with managers to track progress, celebrate wins, and identify areas for growth.
- **Career Pathing Templates and Guides:** Structured tools that outline progression steps, required skills, and milestones for various roles.
- **Global Collaboration:** Initiatives that connect US and India teams, allowing employees to broaden perspectives and gain international experience.

Next Steps

Have Career Conversations with Your Manager

- Proactively schedule time with your manager to share your goals and immediate interests.
- Use these discussions to identify strengths, areas for improvement, and potential opportunities for advancement.

Map Out Your Path

- Work together to outline the steps needed for progression into your next role.
- Identify specific skills, certifications, or experiences required for success.
- Break down goals into achievable milestones so progress feels clear and measurable.

Leverage Human Resources

- HR can provide resources, such as career pathing templates, development planning tools, and role descriptions.
- HR can recommend internal or external trainings aligned with your career goals.
- HR can help you explore cross-functional opportunities or mentorship connections.

Next Steps

Invest in Continuous Learning

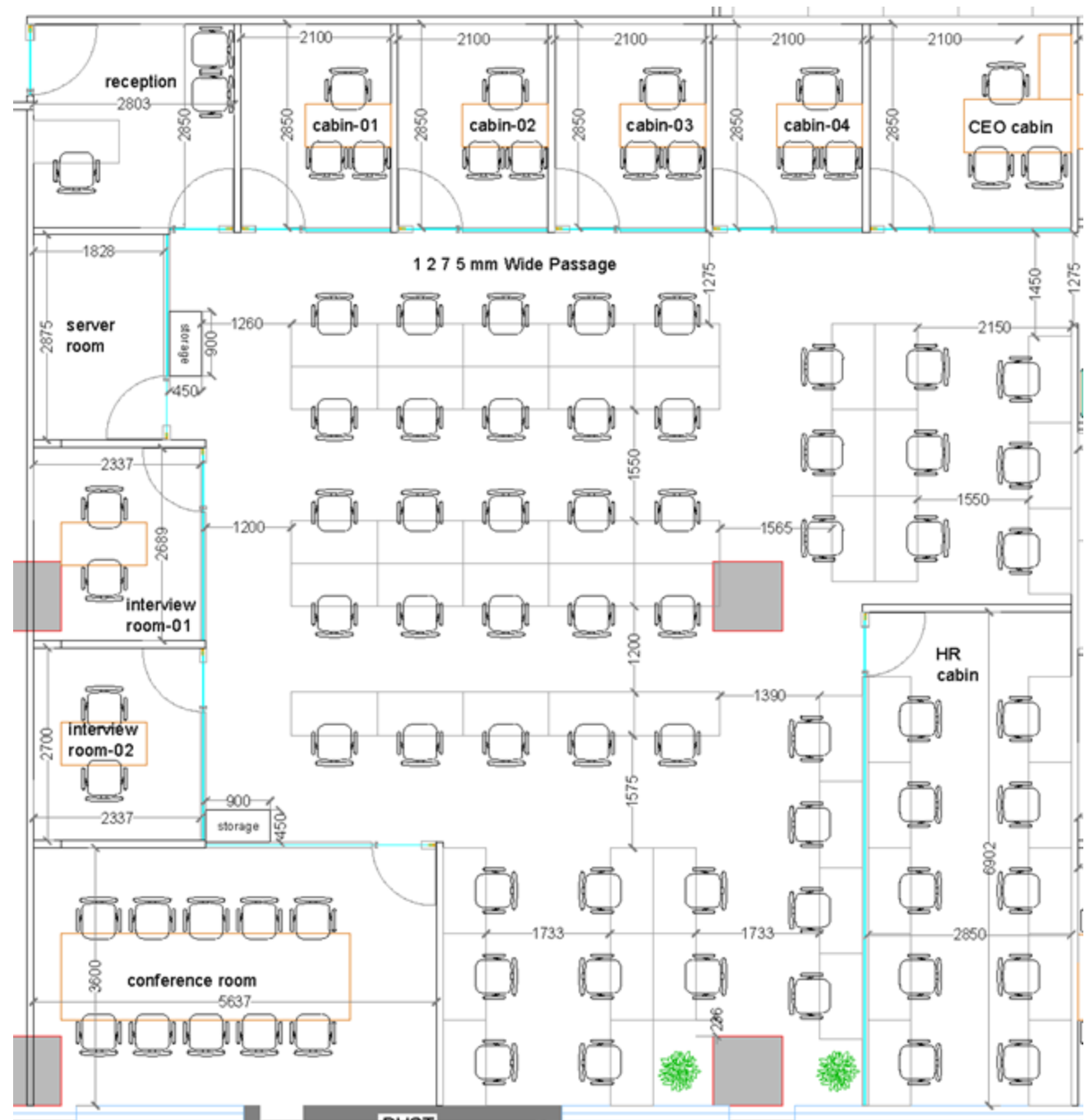
- Dedicate time each month to KnowledgeCity courses or other trainings relevant to your career path.
- Stay proactive in building new skills—even beyond your current role—to prepare for future opportunities.
- Share completed trainings with your manager to showcase progress and commitment.

Seek Out Growth Experiences

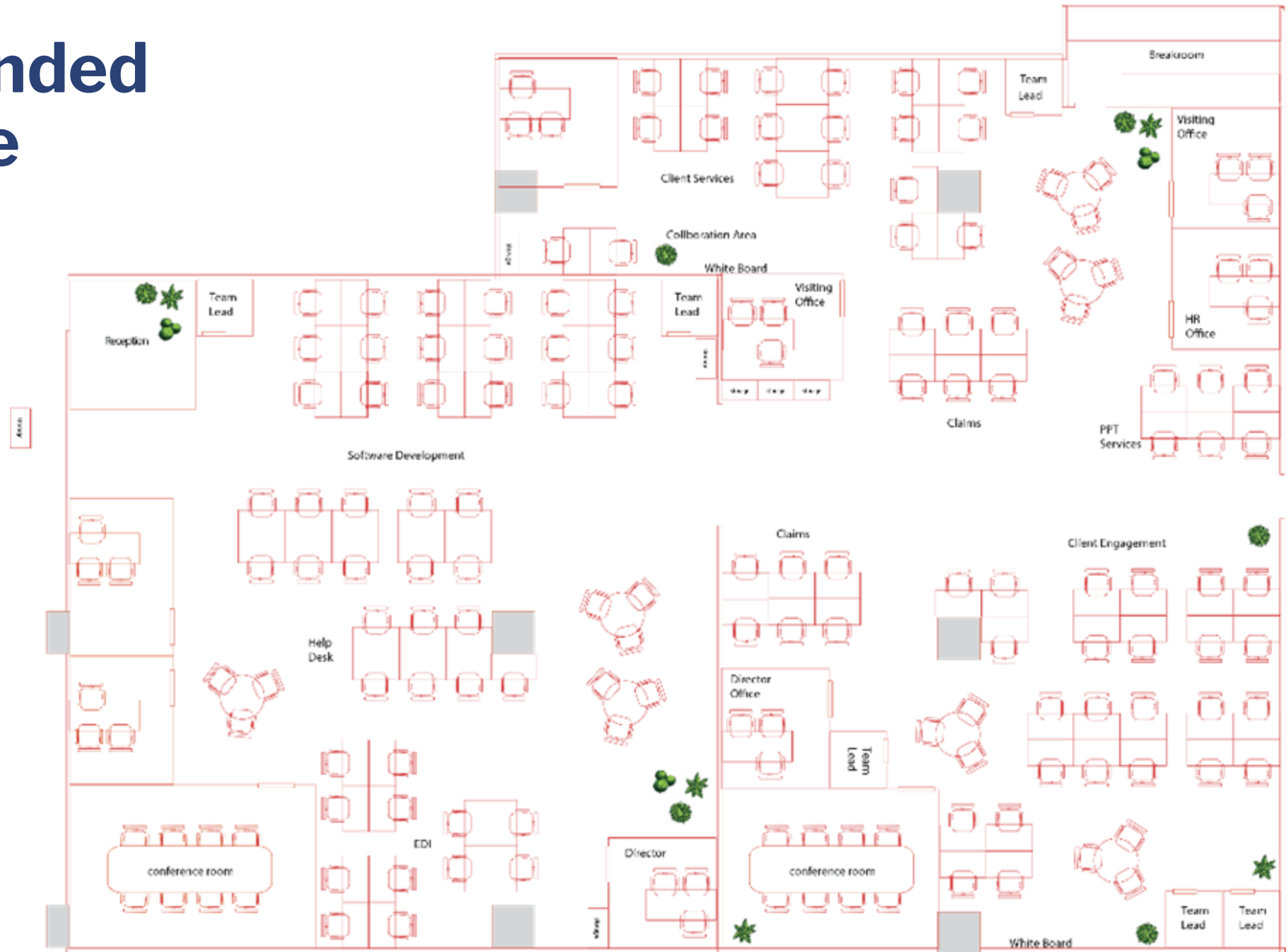
- Volunteer for projects or cross-departmental initiatives that expand your knowledge.
- Participate in mentorship programs to build both skills and networks.
- Use job shadowing or cross-training opportunities to gain exposure to different career paths within Clarity.

New Office

Current India Office



New! Expanded India Office



Wellness Committee Updates

2025 Wellness Committee

Global & Inclusive Approach

- Relaunched in June 2025 to create one unified committee across the US and India.
- Designed with flexibility so onsite, hybrid, and remote employees can participate equally.

Powered by Employees

- Committee members step up as monthly leads, shaping initiatives with their own creativity.
- Builds leadership skills, deepens connections, and empowers employees to take ownership of wellness at Clarity.

Resources & Communication

- A dedicated Clarity Corner Wellness Committee page will serve as the central hub for updates and will include an events calendar to keep employees informed of upcoming initiatives.

Sneak Peek

- Upcoming monthly themes include: *Mental Health & Work-Life Balance*, *Nutrition & Healthy Habits*, *Steps for a Cause*, and much more!

GoVida Wellness Application

What Is It?

- A global wellness application designed for all employees, providing easy-to-use tools to support activity, nutrition, sleep, and mindfulness so that wellness is always within reach.

Why Does It Matter?

- Encourages healthier daily habits while keeping wellness fun and engaging.
- Connects employees across the US and India through individual and team challenges.
- Builds motivation with rewards that can be earned through participation and progress.

What Is Ahead?

- Officially launching in October 2025 so employees can explore and get comfortable with the application (training videos to be provided).
- Provides an opportunity to start tracking, joining challenges, and earning points and rewards.
- A company-wide wellness challenge will launch in December 2025, uniting employees globally in a fun and rewarding way.
- More details to come as we get closer, but get ready to join in and be part of the excitement!

THANK YOU