

Client: Trustmark/CoreSource

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Draft #: 1

Page 1 of 2

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CoreSource Business-Results Reports article (for *CoreSource Report*)

(Head): Check Out Reporting Services on the Virtual Water Cooler

(Body): How's business lately at CoreSource? Finding out has never been easier.

Just go to the Virtual Water Cooler, click on **Business Tools** in the large bubble on the left, and look under "Benefit Administration and Information-Related Services" for the **Reporting Services** link. Clicking this link takes you to the Reporting Services main page, where you'll find links to a wealth of business-results reports for both CoreSource (the left-hand column) and Trustmark (right column).

On the CoreSource side are seven weekly reports and seven monthly reports, ranging from a Weekly Operations Status to the Monthly Active and Terminated Clients list. Updating the reports and managing the database behind them is the job of Reporting Services, a team based in the Minneapolis office of CoreSource. Cheryl Duane, Director of Reporting Services, leads the team.

"Prior to CoreSource de-centralizing in **Month** 2006, reporting was handled by the functional areas—Client Management, Sales, and so on. But as of the start of this year, it's now centralized with Reporting Services," Duane said recently.

The Weekly Up Sales Report is one of the best ways to track CoreSource Client Management's progress over recent months. While new sales are vital to revenue growth (and are featured in a separate report), "up sales"—additional services sold to existing clients—are similarly important to profitability, as they typically cost less to obtain.

The Weekly Up Sales Report is a year-to-date list of these sales, including the estimated Annual Net Revenue, the number of lives added, and the effective date of the new service. The ANR figures are in whole dollar amounts (not thousands). "Up Sales" can include either selling to a new-to-CoreSource division of an existing client, or selling a second or third service to an existing-client division.

"While our new de-centralized structure has many benefits for CoreSource, it's important that our reporting be consistent across all offices," said Lloyd Sarrel, CoreSource VP of Operations. "Cheryl's group lives and breathes reporting—plus it's more efficient to have one team manage the reports. It allows the Client Managers to focus more on their clients' needs." Sarrel also noted that the group not only updates the reports, but also provides data analyses which are used in the Monthly Business

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Page 2 of 2

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Results (MBR) documents.

Besides updating the reports, Reporting Services has taken responsibility for a database that had been managed by Client Management. “As a result, we know the data better now than ever before, and have enhanced some of the reports by adding new fields to them,” Duane noted. “Adding the data has highlighted the need for a larger, more sophisticated database, so we’ve begun working with Corporate IT to develop one.” Given IT’s long list of projects, a firm date has not yet been set for the launch of the new database.

The Reporting Services area of the Virtual Water Cooler complements the Strategy Scorecard, which is also linked on the VWC. The Strategy Scorecard provides a higher-level view of Trustmark’s year-to-date results. Using the most Monthly Business Review data available, the scorecard tracks each business unit’s progress toward its 2007 goals for revenue, profits, and other key financial measures.