



One Source...Many Resources **Making HR & Benefits Easy**

HR, BENEFITS, & PAYROLL TECHNOLOGY MODEL

HR, Benefits, & Payroll Consulting

Consultation to identify new technologies that are available to improve business processes

Vendor Selection

Access to a long list of vendors from a myriad of technology categories

Solution Implementation

Optimization of HR and benefit systems resulting in the greatest return on investment

Ongoing Support

Staff training, continuing hands-on support, and ongoing system upgrade assistance

FLEXIBLE HR, BENEFITS, & PAYROLL SOLUTIONS CO-SOURCED TO ENSURE SUCCESS

Regulations and your workforce are constantly changing. Your employees are demanding access to more information, better insight into their benefits, and more control. You are finding it troublesome to access accurate data. And you want to ease your administrative burden to be more strategic, boost productivity and lower costs.

Like many of our clients, HR, benefits, and payroll technology can play a crucial role in helping to solve many of your business problems. But if the technology is deployed and used without focusing on the problem, it will eventually fail. Furthermore, the marketplace is complex and dynamic, and some vendors are looking to be everything to everyone. It's just not that easy.

Through our strategic alliance with HR Technology Advisors (HRT), a leading HR, benefits, and payroll technology consultant, reseller and implementer, we can offer the required expertise to find the right technology solutions based on your unique needs. HRT has very deep and long-standing experience in selecting and implementing HR administration systems. Once HRT helps select the system, their co-management philosophy assists companies maximize their system's potential and investment and achieve their critical business objectives.



The HRIS Advisory Process

Solving HR & Benefits Technology Problems

The Benefits and HR technology market is rapidly changing.

With new and emerging technologies hitting the markets every day, we pride ourselves in keeping current with the latest technologies available in the HR and Benefits arena. We will consult with you to identify new technologies that are available to improve business processes. Through strategic relationships, we can leverage the right technology, if necessary, to solve those problems.

The Client Resource Center - Access a comprehensive library of HR and Benefits information that fulfills the needs of human resource professionals and employers nationwide by delivering fast, accurate information when and where you need it, like a technology demo center, HR and benefits videos, law alerts, daily news, Webinars, and a HR and benefits compliance guide.

Benefits Communication Audio/Video via the Web - With high-speed Internet access more readily available it has become easier to deliver audio and video via the web. An overview of an employee's benefit options with plan specific information and costs can be recorded and branded around the employer then delivered via the web. This information can then be available to remote office locations and spouses at home.

HR Administration - Deliver all the HR and benefits resources employees need in one easily accessible, constantly up-to-date place. Employers can support employee self-service to ease the workload of HR staff and enhance efficiency, accuracy, and employee relations. Employers have access to a central clearinghouse of critical HR & benefits data, allowing administrators to quickly manage information to ensure employee satisfaction and regulatory compliance.

Benefits Websites/Employee Portals - By utilizing the Internet to post benefits information, applicable forms, phone numbers, links to insurance company websites, and more, you can reduce the number of calls to HR while giving employees 24 hour access to information.

Benefits Enrollment via the Web - Employees will be able to view their benefits information and make their benefits elections via the web. The data can be transmitted to insurers electronically or be placed on the insurers' enrollment forms.

Total Compensation Statements - Many employees don't understand or appreciate the value of their non-payroll expenses. A Total Compensation Statement provides each employee with a picture of the employer's total costs of payroll and non-payroll expenses in a single, easy to understand form.

Web-based Surveys - Build a survey on any topic in minutes. Then send employees a link to participate. Get feedback on HR and benefit related trends, and your employees feel like they are contributing to the decision process, boosting work-life satisfaction.

By asking the right questions, we can:

- Diagnose your problem and identify gaps in your business solution.
- Define your unique high-level requirements.
- Provide the right solutions.
- Or manage the RFP process to find vendors.

We can help you find vendors that provide unique technology solutions like:

- Benefits Outsourcing
- Claims Analysis / Management
- COBRA
- Compensation
- FMLA
- FSA
- HRIS
- HR Outsourcing
- Learning Management
- Performance/Talent Mgt
- Recruiting
- Time & Attendance
- Wellness



The Vendor Selection Process

Your Answer to The Complex World

The HR & Benefits technology marketplace is complex and constantly changing. There are too many unnecessary reasons why projects fail to meet their objectives. You can not afford to take on that risk. Technology can deliver substantial value, but only if the right technology is selected and properly implemented. There are 100s of vendors available, but only a select few will likely align with your objectives.

Technology Solutions to Streamline Your Processes

We have access to a premier resource for the selection, implementation and optimization of HR & Benefits technology, HR Technology Advisors, LLC. They have decades of experience in this market, they know the vendors and the keys to success. We believe your needs are unique and provide technology solutions that are tailored to that uniqueness. Regardless of where you are in the technology process, we can help our clients save time and money while streamlining processes. By developing a sound technology strategy, we can help your technology team find a new system, or supplement the team with project management or subject matter expertise.

We are principally focused on helping our clients achieve results. We strive to select the “best” solution, but also the solution that has the highest probability of success based on our decades of experience in this market. We recommend vendors that are equally committed to quality and excellence. We take pride in our client achievements and point to our successes as a testimony to our commitment to excellence.


We Ask The Right Questions

- Define your current capabilities
- Define high level requirements
- Pinpoint human resources and benefits delivery gaps
- Understand corporate dynamics
- Understand budget
- Manage RFI process
- Manage RFP process
- Manage demo process
- Manage selection process
- Finalize a vendor
- And this is just the beginning...



The Solution Implementation Process

When It Comes to HR and Benefits Technology,
Choosing the Vendor Is Just the Beginning.



Cross The Chasm

From Purchasing the Technology
To Using the Solution

Many companies have very experienced HR personnel who know how to use HR and benefits technology. But because purchasing and implementing technology is an infrequent event, most do not have the time, experience or resources to properly set-up a human resources and/or benefits technology system.

We believe the ***Difference Is In The Delivery***. We help employers find the right technology solution. Then we implement and optimize HR and benefit systems, resulting in the greatest return on investment.

Solution Co-Management

To maximize your investment in human resources & employee benefits administration technology and achieve your organization's goals, you need a trusted partner at your side. Our experienced technology advisor co-manages the solution on a perpetual basis – from staff training with an employer's unique data, to continuing hands-on support after installation, and ongoing system upgrade assistance.

Implementation and Service Partners: A Refreshing Difference

Through our strategic alliance with HRT, we can offer the required expertise to find the right human resources & employee benefits technology solutions based on your unique needs. HRT has very deep and long-standing experience in selecting and implementing HR Administration Systems. Once HRT helps select the system, the co-management philosophy assists companies maximize their system's potential and investment and achieve their critical business objectives.

Co-Management:

An Approach That Drives Success

With budgets tight and demand for rapid return on investment (ROI), organizations are looking for applications that are quick to implement with few resources while still providing needed functionality. Our team understands the day-to-day operational challenges of an HR organization as well as the longer-term strategies for delivering a high return on investment. We utilize our vast experience, solution knowledge and process expertise to help system administrators deliver organizational results quickly and affordably while minimizing disruptions to your HR operations.

For example, HRT trains ***your staff with your data and at your pace***. No more waiting to be trained when some large company says they have time with generic, mostly useless data. When you have a question and call for help, our ***service staff knows the answer because we helped build the system***. The days of anonymous service representatives referring you back to your training manual are over. Our skilled staff will ***assist in all solution upgrades*** when new functions of the solution need to be phased-in.

Project Planning

- Identify Internal Role Players
- Identify Third-Party Integrators

Data Management

- Data Collection
- Data Import

Third Party Integration

- Payroll Companies
- Insurance Companies
- FSA and 401K Administrators

System Set-up

- Corporate Structure
- HR Structure
- Benefits Structure
- Contributions
- Reporting Requirements
- Security Roles and Rights
- Establish System Settings, Like:
 - Pick Lists
 - Benefits Rules
 - Leave Policies
 - Recruitment
 - Talent and Assets

Training

- Personalized Training Using Your Own, Real Data
- Administrator Training
- Manager Training
- Communication to Employees

Ongoing Service

- Ongoing Assistance
- Report Generation
- System Modifications
- Update Benefit Plans and Rates at Renewal

And More...

Sample Case Studies

Scenario 1: Payroll and HR Technology Need

Situation

- 130 FTE employer seeking Payroll and HR
- Payroll processed via service bureau and company dissatisfied with service
- Client lacked HR system
- Client requested that we show some HR solution during RFP process

Process

- Showed sample solution during selection process but emphasized ability to objectively define requirements and select most appropriate solution
- Our strategic technology partner (HRT) gathered extensive Payroll and HRIS requirements during two phone discussions
- HRT developed HRIS and Payroll RFP and submitted it to roughly 15 vendors
- HRT scored vendors on results and recommended finalists based on feature/functionality and price
- HRT managed finalist presentations and demonstrations

Deliverable

- Customized RFP
- Vendor comparison and score
- Finalist presentation management
- Solution recommendation

Result

- Client selected integrated HR and Payroll vendor
- HRT supported implementation process

Technical Questions	ADP	e-CHA	Equinox HR	Mangrove	Mozy	Sage	PrimFax
When was the software developed and how long has it been in production environment?	3	3	3	1	3	1	NA
What types of database technology is used?	3	5	3	3	4	5	NA
Do you use shared or relational databases?	3	4	3	3	4	3	NA
What is the current version of the software?	1	4	3	3	4	3	NA
How frequently do you provide updates to the software?	3	4	3	3	4	3	NA
How are patches delivered?	3	4	3	3	4	5	NA
Do you have a user group for product enhancements?	3	4	3	3	4	3	NA
Please describe database encryption methodology.	3	4	3	4	4	0	NA
What kinds of audit trails exist?	3	4	3	3	4	3	NA
How does the software control access to sensitive information?	3	4	3	3	4	3	NA
What are your help desk hours?	3	3	3	3	4	3	NA
Avg. Score	2.82	3.91	3.00	2.91	3.91	2.20	NA
Rank	1	5	3	2	0	4	NA

Note: Score Summary: 1 = Exceeds, 3 = Meets, 5 Does Not meet Expectations

Open: 2008 (2008) | 1 = 2008 | 2 = 2008 | 3 = 2008 | 4 = 2008 | 5 = 2008

Score	1	2	3	4	5	6	7	8
ADP	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equinox HR	3	3	3	3	3	3	3	3
Mangrove	3	4	3	3	4	3	3	3
Mozy	3	4	3	3	4	3	3	3
Sage	3	4	3	3	4	3	3	3
PrimFax	3	4	3	3	4	3	3	3

Scenario 2: Employer Needed Benefits Outsourcing

Situation

- 1,200+ employee organization looking to move from benefits outsourcing vendor

Process

- HRT conducted phone interview of client's key constituents to define requirements
- HRT built Technology RFP and submitted to 12 different benefit outsourcing organizations
- HRT summarized and scored results to define semi-finalists
- Semi-finalists were presented with a script for 30 minute demonstration
- Finalists selected and HRT scripted full 60 minute demonstration
- HRT gathered final pricing and supported negotiation
- Site visit completed

Deliverable

- Customized RFP
- Vendor comparison and score based on feature/functionality and price
- HRT managed finalist presentations and demonstrations
- Managed site visit
- Vendor recommendation

Result

- New Benefit Outsourcing Vendor Selected
- HRT provided oversight of implementation process

Question #	Evaluation Criteria	Column1	Column2	Column3	Column4	Column5	Column6	Column7
1	Exceeds Expectations							
2	Meets Expecta							
3	Falls Well Below Expectations							
4								
5								
6								
7	Vendor							
8	1	What is the total number of companies using the software product? (Note: This is the total number of product installations?)	4	3	1	1	4	2
9	1.1	Installations for companies with 101 - 500 Employees	4	3	2	1	4	3
10	2	Does the vendor support a call center for all support needs? Describe the support provided and the availability of the call center.	2	2	1	2	4	3
11	3	Does the vendor provide live 24x7x365 technical support?	1	0	2	2	3	2
12	4	Does the vendor provide training? What types of training are provided (i.e. Train-the-Trainer, Super User, End User, Technical, etc.)	2	2	2	2	2	2
13	5	Can the vendor supply product implementation support and services? Describe the level of implementations services the vendor can provide.	2	2	2	2	2	2
14	6	How long has the vendor been in business?	3	3	2	3	4	3
15	6.1	How long has this specific product been on the market?	3	3	2	3	4	4
16	7	Is the vendor a global company, i.e., product is in use by companies/employees in countries other than the U.S.?	2	2	2	2	3	2
17	Support							