



Powerful Payroll and HR Technology with World-Class Service
for Employers

Special thanks to RBAZ!



ShopTalk



Let's explore your strengths and weaknesses

During this ShopTalk, we'll discuss:

- Identifying your strengths and weaknesses as an employer
- The importance of the employment lifecycle
- What competitors are offering employees and how you compare
- The minimum essentials for retaining today's workforce
- WorkTrend's Quick Start and Easy Manage
- Premiere 401K Plan



Continuously exceeding
Employer and Employee
expectations is our # 1 Goal

Are you a Dysfunctional Employer?

Dys·func·tion·al , Adjective, Not Operating Normally Or Properly

- Yes you are! Every employer is dysfunctional!
- Causes can be external and/or internal
- No employer is perfect!
- Does not matter the size of the organization!
- Employee's needs are organic and changing constantly
- Employees don't expect employers to be perfect
- Employees admire employers that acknowledge their weaknesses and actually put in effort to improve

MRB's Side Note

- All features we discuss are available to MRB's
- RBAZ and WorkTrend have streamlined the payroll service and Banking process
- Full Technologies & Services
- Including Full tax remittance, filing, reporting
- Including automated Direct Deposit
- Benefits & 401k and HR



Why does the Life Cycle of The Employee Matter

- Labor expense; understanding your #1 or #2 largest expense at your company is vital to your success
- Employee life cycle system limitations or lack of systems and policies during these phases as example: **applying, onboarding, time tracking, performance reviews, benefits enrollment, etc.**, lead to employee *dismay, distrust, stress and dissatisfaction*.
- Large Percentage of employees determine in their first two-weeks at an employer, if they are going to stay



Why does the Life Cycle of The Employee Matter

- You can't fake employee happiness. This unfortunately affects the overall culture, and rubs off on other areas of your company, like with your customers
- If managed properly employers can realize a dynamic shift from watching over the employees to the employees watching over the company
- The cost of not doing things right is extraordinary: *Money, Time, Quality, and reputation*. Turn-over, Hiring, Training, Effect on existing, Effect on Customers, Etc.



Employer SWOT Analysis

Strength

Advantages?
Uniqueness?
Selling Points?
Skills?
Other factors?



Weaknesses

Limitations?
Lack of effort?
Problems?
Poor strategy?
Other factors?



Opportunities

Improvements?
Performance?
Opportunities?
Consumer Behaviour?
Other factors?

Threats

External trouble?
obstacles?
Competitors?
Trends?
Other factors?

The Employee Life Cycle

Modern Employee Experiences

EMPLOY

Talent Management



Attract & Hire

- Recruiting
- Job postings
- Applicant tracking



Onboard & Develop

- New hire forms
- WOTC eligibility
- Compliance
- Talent identification & nurturing

ENABLE

HR & Payroll



Payroll

- Employee self-service
- Direct deposit
- Pay cards
- Tax filing & credits
- Garnishments



Human Resources

- Manager self-service
- PTO accrual
- Job history
- Salary management
- Certification tracking
- Audit & compliance
- Document Mgmt.
- Offboarding



Time & Attendance

- Time and labor
- Attendance
- Time clocks
- Scheduling



Benefits Enrollment

- Benefit management
- Benefit cost analysis
- Open enrollment
- ACA compliance
- Life event / FMLA
- Carrier integrations
- FSA, HSA, HRA
- COBRA

EMPOWER

Engagement Management



Share & Perform

- Employee surveys
- Collaboration
- Rewards & recognition
- Goal setting
- Performance reviews
- 360 peer feedback



Learn & Grow

- LMS
- SCORM compliant
- Content marketplace
- Social learning
- Gamification
- Customizable content

← **ENGAGEMENT** →

It's the journey that matters

What is Employee Engagement?

In essence, employee engagement is the emotional commitment the employee has to the organization

- 71% of Executives believe employee engagement is critical to their success (HubSpot)
- 85% of Employees Are Not Engaged in the Workplace (Gallup)
- 69% of Employees would work harder if they felt more appreciated (Fastrack 360)
- 73% of Employees Are Considering Leaving Their Jobs (JobList)
- Companies with Highly Engaged Workforce Are 21% More Profitable (Gallup)

Engagement is NOT employee *Happiness* or *Satisfaction*, it's the everyday interactions that contribute to happiness

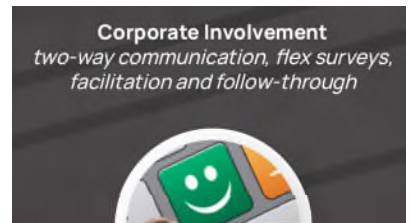
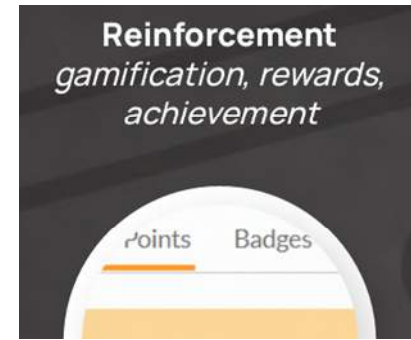
Successful Companies Develop an effective employee engagement strategy and utilize tools like WorkTrend to carry out



What do successful Employee Engagement Strategies include?

- **A lively feed wall** to stay aligned across functions and locations while talking, collaborating, and keeping up with colleagues and projects.
- **A personalized dashboard** that keeps the most important information right where you need it.
- **Pulse surveys**, designed to find out what a specific individual, group, or function is thinking and feeling about a particular situation or project.
- **Crowdsourcing ideas** and watching as good ones take off and go viral with up votes from the entire organization.

- **Praise for team members** who have outstanding performance. Don't wait for the annual performance review or quarterly staff meeting to praise your employees who are performing well.
- **Rewards and recognition tools** that allow your team members to rack up points when they collaborate, share, and help one another. If you want to take the recognition to the next level, award cool stuff to your employees when they achieve true status.
- **Gamification elements** to keep employees engaged and excited about interacting with one another and moving up the leaderboard.



**Competition for talent, highest in decades.
To succeed in these early stages make the
process easy, streamlined and welcoming**

- **Online 24/7 access**
- **Posting blitz to job boards**
- **Showcase Brand and Mission**
- **Keep applicants organized, screened, etc**
- **Automate process for applicant's sake**
- **Automated Communication clear/direct**
- **When onboarding process should be 100% electronic**



First Impressions are everything!

Employees determine their future with ER at this stage

Employees want to know that their employer has a process for everything. This reduces stress and increase adoption of change.

- Systems that are easy to access 24/7
- Easy to change and communicate online
- Automated workflow and prompts for important dates: Benefits enrolment, employee reviews, milestones
- Easy to view and update information
- See Organization information
- Solid and fair HR Policies and Decisions

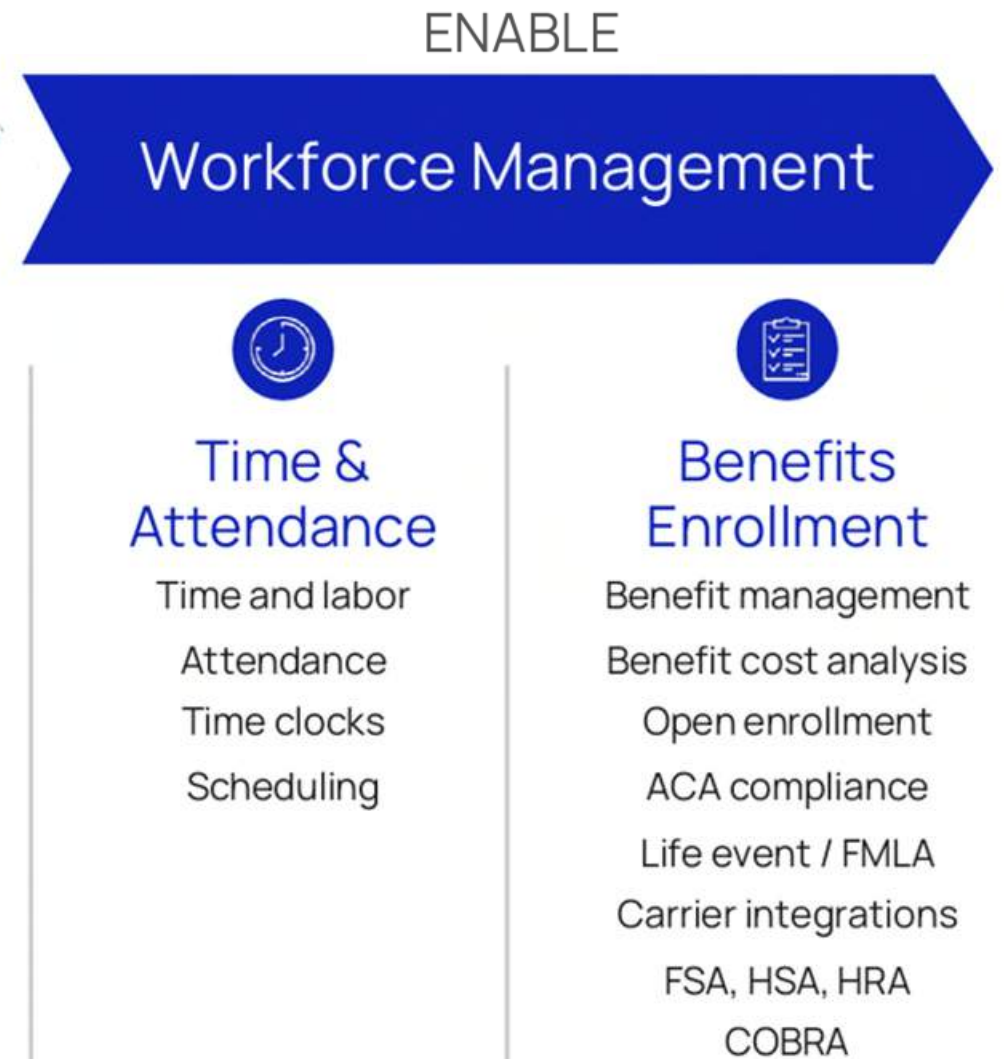
Employees want to see their HR leader as much as they would want to see a teller as opposed to using an ATM machine



Constantly following up with your employer for time and attendance, or benefits issues, is scary! Employees assume employers have policies, requirements, and regulations covered.

- **Easy options for clocking in: PC, Mobile, HW**
- **Scheduling or shift swapping options**
- **Automated time off requests with Calendar views**
- **Electronic paperless benefit enrollment**
- **Benefits options and info easily stated cost of chosen benefits**
- **Integrations with carrier for information changes**
- **Ability to make automated Qualifying Event changes**

Employer Credibility is gained or lost quickly in this stage!



Visionary employers understand that the development of employee's minds through sharing, community, learning and more.

- A company eco-system, a culture develops
- How the Company fits into the community
- Clearly communicating Organizational Goals
- All levels of Org can show involvement
- Praise and appreciation of employees
- Employees know where they stand
- Employees continue to develop through learning. This feeds the mind; gratifying
- Keep employees engaged, learning and challenged



The Minimum Essential Needs

- | | |
|---|---|
| 1. Payroll /HCM System | Exceptions: No employees. Contract Labor workforce |
| 2. Applicant Tracking (ATS) | Exceptions: Not Hiring |
| 3. Automated Onboarding | Exceptions: Not Hiring |
| 4. Automated Time Tracking and Time Off | Exceptions: All Salary Employees |
| 5. Automated Performance Reviews | Exceptions: None |
| 6. Automated Benefit Enrollment | Exceptions: Under 25 Employees or Management Only Plans |
| 7. 3 rd Party HR Collaboration | Exceptions: SHRM Senior Certified Professional on Staff |
| 8. Engagement Tools | Exceptions: Under 10 Employees, 1 Location, All work onsite |

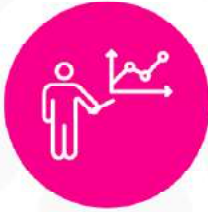
It's the journey that matters

Quantifiable Benefits of a HCM System

Forrester Research Group interviewed our system users to compare the costs against the benefits and ROI over a three-year period. Through their independent research, they uncovered the following value



Increased
employee retention



Improved
HR productivity



Reduced payroll
admin costs



Eliminated fees for
retired solutions



Avoided erroneous
benefit payments



Accelerated
onboarding



Simplified
compliance



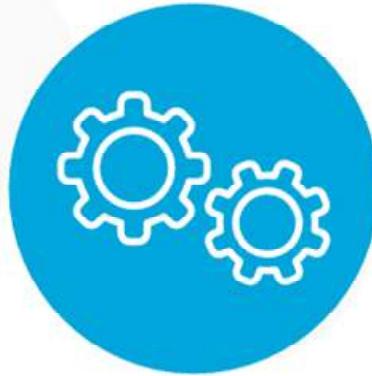
Avoided timeclock
replacement

FORRESTER[®]

Non-Quantifiable Benefits of our HCM System



Attracted a next-generation workforce



Improved first-line management capabilities



Strategic business support

Compliment your employee attraction and retention efforts with a Quick Start and Easy Manage 401k

Employee Retirement Planning

401(k) Plans - Cost-effective solutions now accessible to your employees.

88% of workers say a 401(k) is an important benefit and 81% say it impacts their decision on where to work. Employers can more easily attract and retain top talent with a low maintenance and comprehensive 401(k) plan.

Economical

Easy to implement and maintain

Fully integrated in isolved People Cloud

Advisory services

Reduced liability

Minimal administrative burden

No annual audits (<100 employees)

No individual 5500 reporting



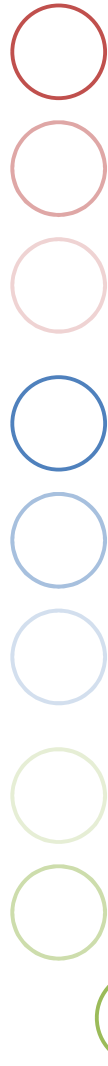
Delivered in partnership with Transamerica - the 401(k) leader in the U.S.

MYTH	"Offering a retirement plan is expensive."
FACT	Our 401(k) provides economies of scale by aggregating assets and administration.
RESULT	Lower costs!
MYTH	"I don't have time for retirement plan administration."
FACT	Virtually all administrative tasks are handled by isolved Retirement Services
RESULT	You can focus on what you do best. Running your business!

Tax Credit

Secure Act Small Business

Tax Credits Available for Establishing a New 401(k) Plan



1

Available for plans established after 1/1/2020
100 eligible participants or less

2

Tax credit up to 50% of eligible expenses up to \$500 per year for 3 years
Initial set-up costs and administrative expense for 3 years

3

Additional auto-enrollment tax credit:
\$500 tax credit for 3 years for a total of \$1,500



Please Contact WorkTrend for More Information:

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480-877-9465

Thank you!