the difference is in the
DELIVERY

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 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.

HRT
HR TECHNOLOGY ADVISORS
BROKER PARTNER

HRT Broker Partners Are Part of Something Bigger.

The HRT Consulting Process

The HRT process used to provide consulting and advisory services can be broken down into 3 phases: **Discovery**, **Selection, Purchase and Implementation**.

Each phase is a self-contained process and result, and you will always have the opportunity to continue to the next phase. Phase 1 will be conducted by your Market Manager, who will also have overall responsibility for shepherding you through the entire process. Phase 2 will be conducted by an HRIS consultant, and Phase 3 will be conducted by an HRIS Implementation Specialist or Account Manager, depending on the vendor selected.

Phase #1: Discovery
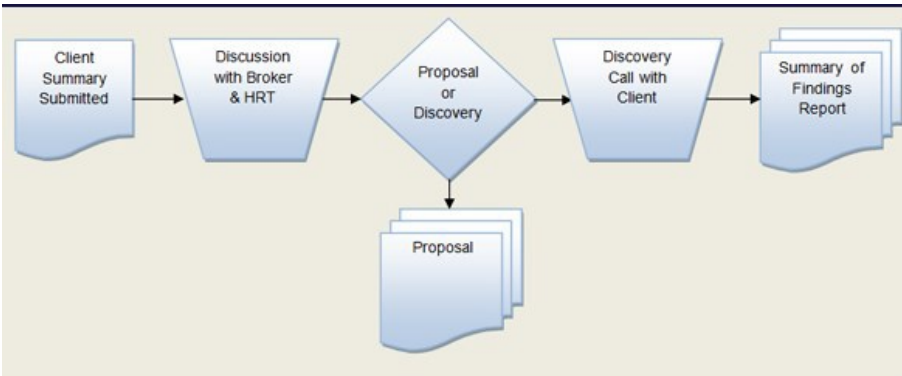
Phase #2: Vendor Selection
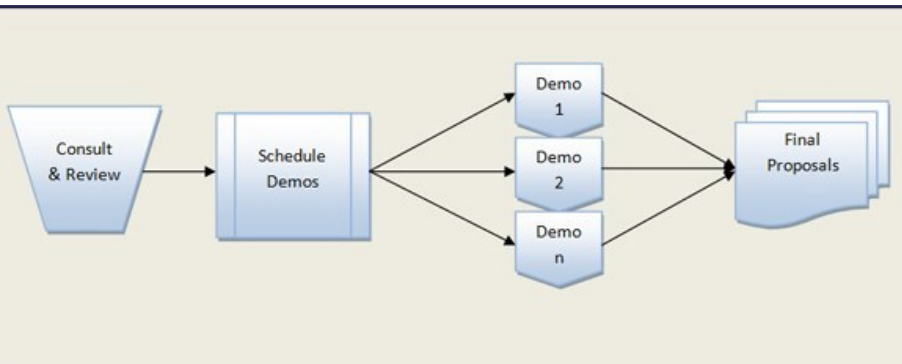
We Ask The Right Questions

- 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...

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 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.

The Solution Implementation Process

Phase #3: Purchase and Implementation

To a certain extent, purchase and implementation cannot be reduced to a fixed set of steps. Too much depends on the product being purchased, the vendor it is being purchased from, and the complexity of the configuration. In some rare instances, HRT will perform the implementation and training of the product, in others the vendor's re-seller will. In all cases, the cornerstone of the implementation is the Project Plan. While HRT does not play a role for the most part during implementation, HRT can be considered a resource to go back to a vendor if implementation ever goes wrong. Since HRT has a relationship with vendors, reaching back to HRT when things are not going as expected often will help raise the issues to the appropriate people that the issue needs immediate attention.

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.

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…

**Leveraging Technology Solutions to Streamline
Human Resources & Benefits Processes**

Vista National INSURANCE GROUP, INC.

HRT HR Technology Advisors
BROKER PARTNER
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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

Technical Questions	ADP	e-Chx	Exponent HR	Mangrove	Mpay	Sage	PrimePay
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 upgrades 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	3.20	NA
Rank	1	5	3	2	5	4	NA

Note: Score Summary: 1 = Exceeds, 3 = Meets, 0 Does Not meet Expectations

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

4	Exceeds Expectations						
2	Meets Expecta						
0	Falls Well Below Expectations						

Question #	Evaluation Criteria	Column1 ADP	Column2 HR Office	Column3 HR Net	Column4 Humanic	Column5 iEmployee	Column6 NuView	Column7 Perfect Software
Vendor								
1	What is the total number of companies using the software product? [Note: This is not total number of product installations]?	4	3	1	1	4	2	2
1.1	Installations for companies with 101 - 500 Employees	4	3	2	1	4	3	4
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	2
3	Does the vendor provide live 24x7x365 technical support?	1	0	2	2	3	2	0
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	2
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	3	2
6	How long has the vendor been in business?	3	3	2	3	4	2	3
6.1	How long has this specific product been on the market?	3	3	2	3	4		4
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	2	3	2
Support								