

September 14, 2023 | 11:00 A.M. ET

rkl

WHAT'S NEXT >

WEBINAR SERIES

Insights & education on the latest issues impacting
people, profits and processes

Housekeeping Items

- The webinar will be recorded and shared as soon as it is available via email
- Today's materials will be shared in the chat box
- All lines are muted
- NASBA CPE requirements – in order to receive CPE for this webinar:
 - Participants must be connected to the session (both audio and presentation) for its entirety
 - Participants must answer three questions/elements of engagement
 - One (1) hour of CPE in the field of Personnel/HR will be granted if you meet these requirements

DISCLAIMER: The presenters, Gretchen Naso, Stephane Smith and Lindsay Heist, and RKL LLP and its subsidiaries/affiliates are not held responsible for information that has changed or will change and makes no representation or warranty as to the ongoing accuracy of the information presented orally or in writing. Attendees should consult with legal, accounting and other advisors.

Meet Today's Presenters



Gretchen Naso, CVA, MBA

President, RKL Virtual Management Solutions

For the past three decades, Gretchen has evaluated the structures, staffing and processes of businesses across the US and identified opportunities to increase value and efficiency. As President of RKL Virtual, Gretchen achieves these goals on a broader scale with an entity dedicated to helping businesses achieve next level growth.

Lindsay Heist

Workforce Strategies HRIS Solutions Practice Leader, RKL Virtual Management Solutions

Lindsay is the Workforce Strategies HRIS Solutions Practice Leader for RKL Virtual Management Solutions. In this role, she oversees the software capabilities that support RKL Virtual's HRIS Solution, a technology and HR advisory offering. She has experience working in a variety of industries including banking, manufacturing and warehouse distribution.

Stephane Smith, SPHR, SHRM-SCP

Workforce Strategies Vice President, RKL Virtual Management Solutions

As Vice President of Workforce Strategies for RKL Virtual Management Solutions, Stephane directs the firm's comprehensive suite of outsourced HR and compensation services. She leads a team of HR advisors who fill key roles for employers, including compensation analysis, performance management, compliance, recruitment and full outsourcing of the HR function.



What Will We Introduce

1.

Benefits of
HRIS/Payroll
Automation

2.

System Selection

3.

Change Management

4.

Questions & Closing

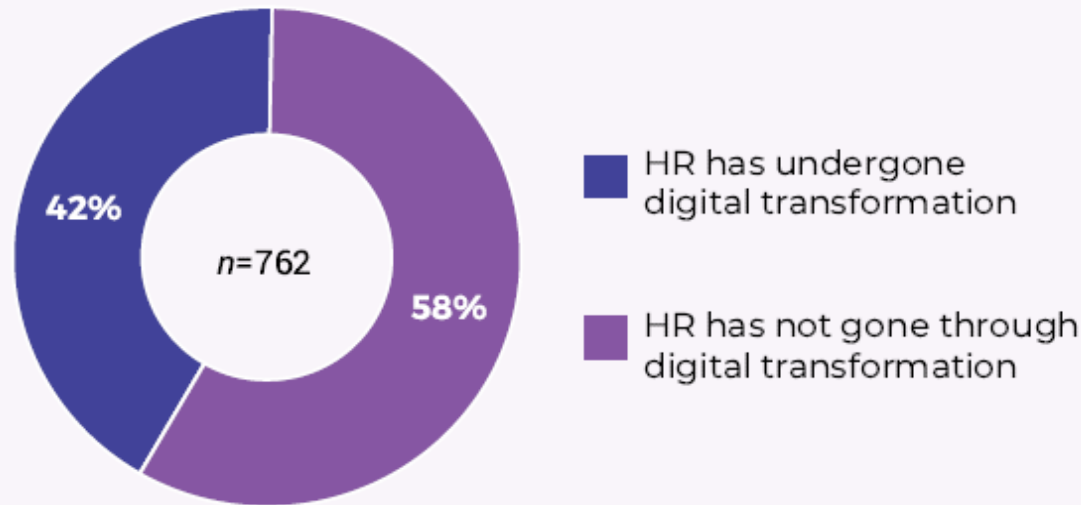




Benefits of HRIS/Payroll Automation

HR's digital transformation is closely tied to performance and effectiveness

Most respondents report their HR departments have not yet undergone digital transformation.*



*Digital transformation: The conversion of processes, documents, and other organizational information into a digital format through the use of digital technology.

HR departments who have undergone digital transformation are:

1.7x more likely to report they are high performing at facilitating data-driven people decisions.
n=755

1.2x more likely to report their HR departments are highly effective (i.e. producing desired outcomes or results).
n=753

Similarly, organizations where HR has undergone digital transformation are:

1.3x more likely to report they are high performing at quickly changing at scale to capitalize on new opportunities.
n=755

1.2x more likely to report they are high performing at generating and implementing new ideas and workforce productivity.
n=760

Risks of Outdated HR Tech Stack

- Productivity loss
- Data vulnerability
- Employee disengagement
- Reduced level of service to stakeholders
- Difficulty supporting remote workflows
- Significant burden to the HR team



Nucleus Research revealed that, for every dollar spent on HCM technology, organizations see \$9.13 in returns, on average. Implementation of a cloud-based HCM solution can cost 79% less than on-premises tech, and, with less ongoing maintenance to worry about, HR teams also experience 90% in savings over the year.⁵

⁵<https://newsroom.infinisource.com/six-reasons-why-hcm-technology-is-taking-off>

POLLING QUESTION

To be eligible for CPE, 3 polling questions must be answered.

On Average, Employers will Recognize

- 2-4 hours per employee, per month by eliminating manual forms and enabling self-service
- \$10,000 per month in making corrections
- Countless hours through a streamlined process



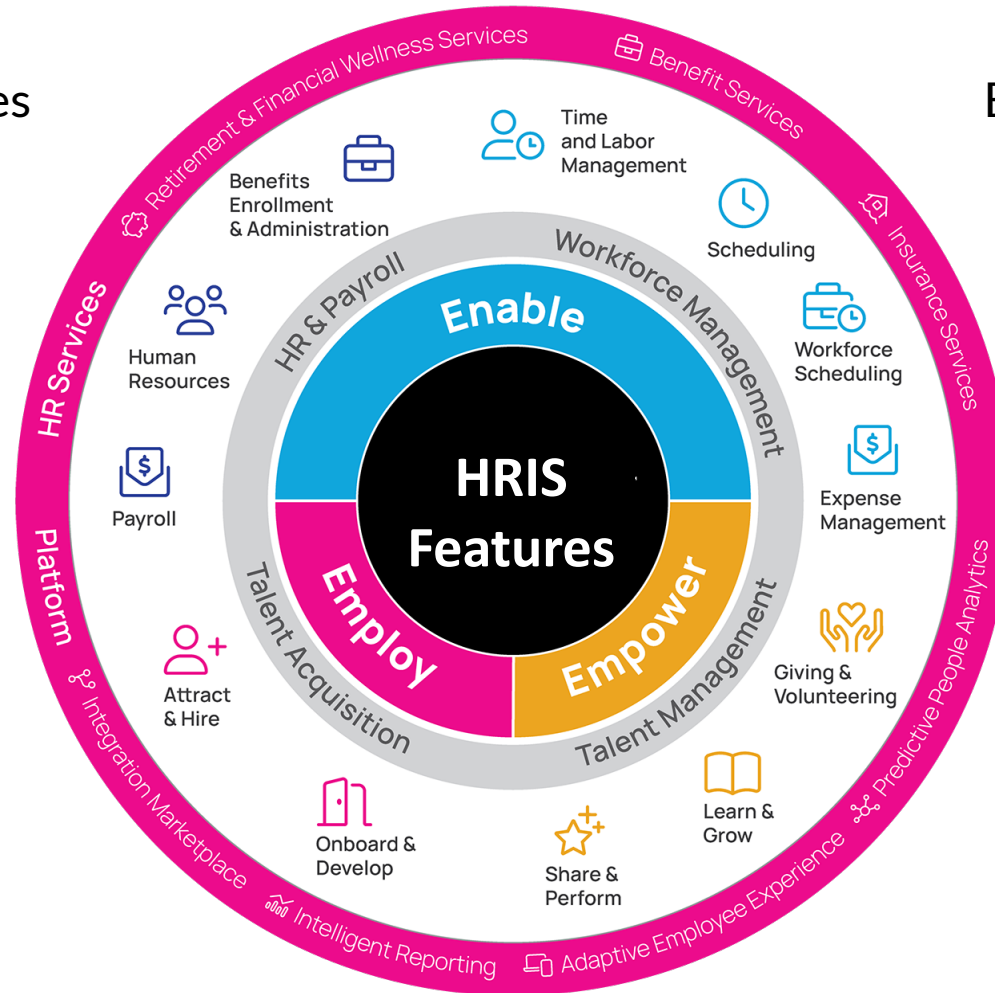
HRIS & Automated Payroll Features

Payroll and benefits services

Efficient workforce management

Talent management

Adaptive employee experience



Advantages of HRIS



Recordkeeping



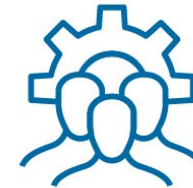
Time saving



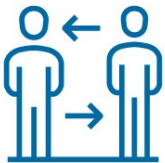
Improved compliance



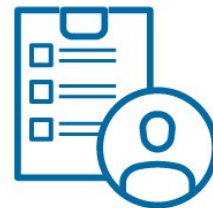
Improved efficiency



Manager/Employee
self-service



Streamlined recruiting
and onboarding



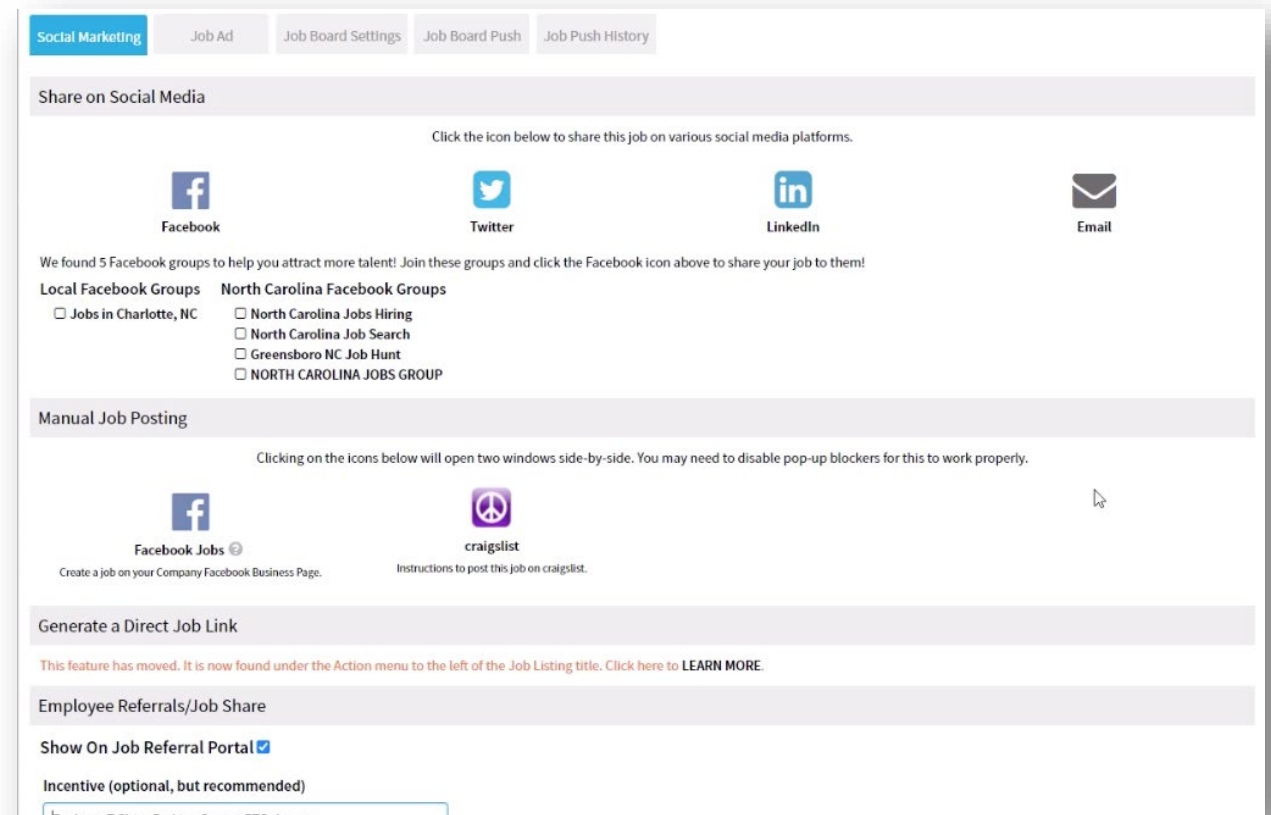
Centralized
performance management



Employee
experience

Applicant Tracking Solution

- Make smarter hiring decision
- Reduce time to fill positions
- Better candidate experience
- Reduce time
 - Maximize outreach on multiple job boards with one data entry point
 - Calendar integration for interview scheduling
 - Hire at scale
- Improve cost to hire
- Candidate scoring and spotlight
 - Active management involvement



Improved Onboarding

Built-In Tool Time

Automate employee eligibility I-9 forms and processes for new hires and hiring managers—giving them both valuable time back on their calendars.

Digital John Hancock

Enable new team members to breeze through documents like employee handbooks and non-disclosure agreements digitally with electronic signatures.

Automate Workflows

Implement, collect, track and store all forms and documents, including federal and state tax forms and prevent potential costly errors.

Ditch the Desk

Allow onboarding tasks to be completed from any device, at any time, and from any place.

Main Takeaway:

New hires are excited to join your team—meet their excitement through a modern, streamlined onboarding experience that will prepare them to make an impact on your organization.

Payroll Automation

- Employee self-service
- Direct deposit
- Tax location automation
- Tax filing & credits
- Garnishments
- Automated payroll processing

Process Payroll

Next Payroll Run Last Payroll Processed

Process Payroll

- **WARNING: The run date for this payroll is after the required impound date.**

Send Timecard Reminders ⓘ

Lock Time Cards	<input type="button" value="Lock"/>	^
Commit Time Cards	<input type="button" value="Commit"/>	∨
Submit Payroll	<input type="button" value="Submit"/>	∨
Preview Payroll	<input type="button" value="Preview"/>	∨
Process Payroll	<input type="button" value="Process"/>	∨

Timecard Review Reports

Alert Occurrence Count Report ∨

Report Writer reports will require committing data.
* Indicates a Report Writer report

Payroll Details

Run Type:	Regular Payroll
Run Date:	08/30/2023
Pay Date:	09/01/2023
Period Begin Date:	08/14/2023
Period End Date:	08/27/2023

Check Stub Message

[+ Check Stub Message](#)

HR Management

- Manager self-service
- Employee portal
- Salary and job history
- Certification tracking
- Audit & compliance
- Onboarding & offboarding
- Document management



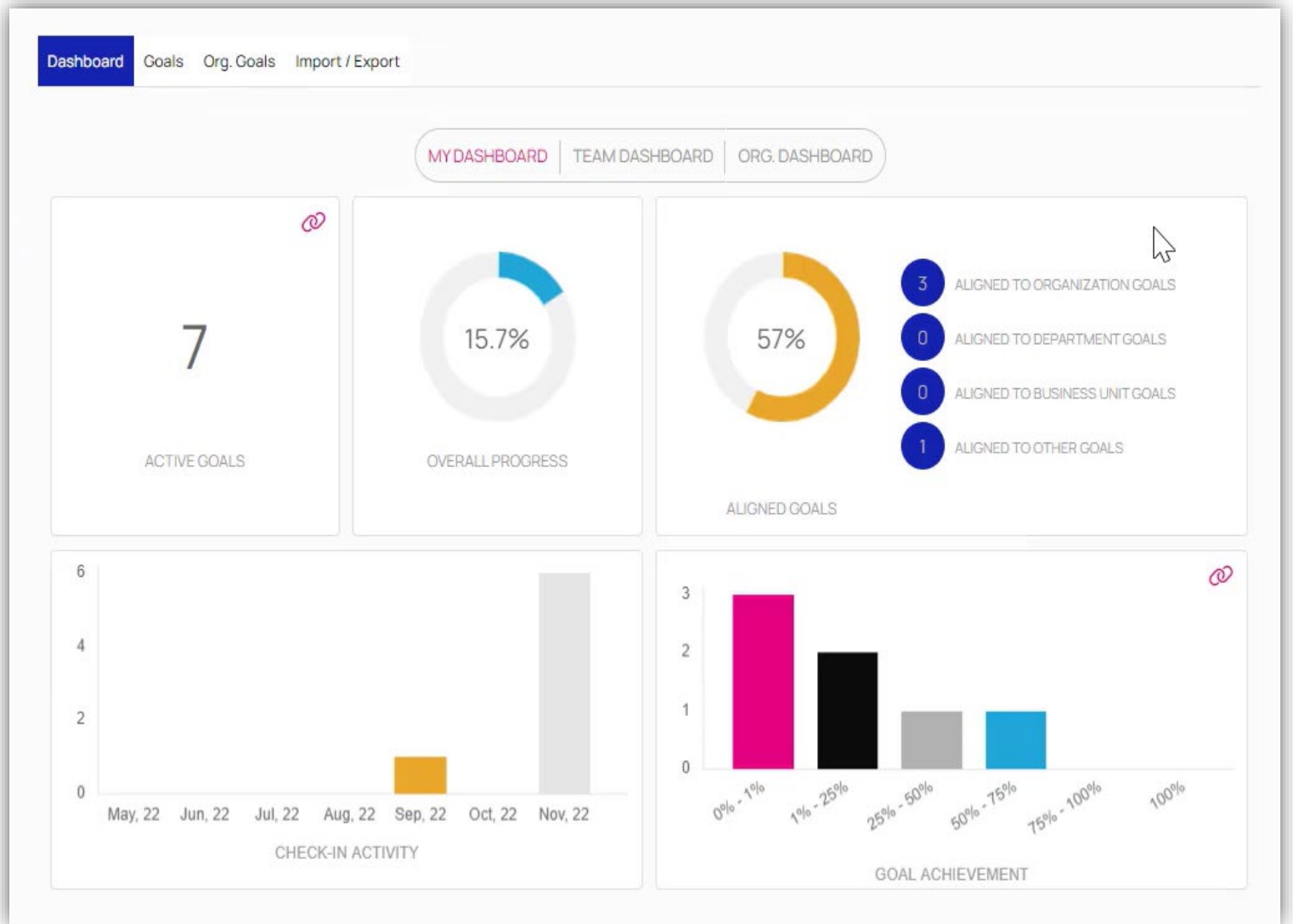
Winnie Ann
Administrative Assistant
ANNAPOLIS, MD

Mobile Phone 717-888-6613
Self-Service Email kbish0412@gmail.com
Address 456 Eastern Blvd
YORK, PA 17402

PERSONAL INFORMATION	SSN XXX-XX-XXXX	Birth Date 03/17/XXXX	Gender Female	Marital Status Single	Personal Email winwin@testemail.com	Military Status
EMPLOYMENT INFORMATION	Legal Company Terrapin Pharmacy 2023	DBA	Employee ID 5	Timeclock ID	Hire Date 03/05/2023 5 months, 27 days	Adjusted Service Date
	Status Active	Employment Category Full Time	ACA Status ACA Full Time			
JOB INFORMATION	Job 03 - Administrative Assist...	Effective Date 06/26/2023	Length of Service in Job 2 months, 6 days	Job Group Administrative Support	EEO Category Administrative Support W...	Workers' Comp
PAY INFORMATION	Pay Group Biweekly	Frequency Bi-Weekly	Pay Type Hourly	Normal Hours 80.00	Effective Date 04/10/2023	Salary ##### annually ##### per pay ##### per hour
	Direct Deposit Full Direct Deposit					
TAX INFORMATION	Federal Head of Household	State (Residence) Pennsylvania	State (Work) Maryland	Location ANNAPOLIS, MD (Work) PA1334300 (Resident)	School District 67900	
MANAGERIAL ASSIGNMENTS	Assigned Manager Marco Polo	Assigned Supervisor Scooby Doo	Organization Manager(s)	Organization Supervisor(s)		
ORGANIZATION INFORMATION	<	Division 01 - Lancaster	Department 02 - Retail	Benefit Class		

Talent Management

- Customizable performance reviews
- Goal setting
- Dashboards for easy tracking of progress
- Streamline the process with automation and reduce paperwork



Employee Engagement

- Encourage collaboration
- Rewards & recognition
- Announcements and file sharing

Bulletins Feed **Actions** Values Praise Wall Leaderboard

PENDING ACTIONS

🔗 1 feedback request(s) pending	VIEW
🔍 1 survey(s) pending	VIEW
🎯 1 goal(s) due for check-in	VIEW
🗑️ 1 self nomination pending	VIEW
🚩 1 initiative(s) pending	VIEW
💡 1 suggestion(s) pending	VIEW
🏆 6 supervisor review(s) pending	VIEW

RECENT ACTIVITIES

- Charlotte L Russon has shared feedback about Emily C White
Thursday
- Anthony Lopez has shared feedback about Grayson H Cvetkovic
Thursday
- Aria Miller has requested to join a group: HR Department
Nov 15, 2022

Feedback Shared

Month	Count
May, 22	0
Jul, 22	1
Sep, 22	2
Nov, 22	1

Overall Leaderboard

	Meghan Mikolajewski	3650 points	#1
	Emily C White	2600 points	#2
	Jackson L Walker	1300 points	#3
	Carla A Garcia	1250 points	#4
	Noah L Smith	950 points	#5

Goal Progress

15.71%

7 active goals

Goal Alignment

57%

4 out of 7 goals aligned

UPCOMING BIRTHDAYS

- Mason J Williams
Jan 9
- Carter A Thompson
Jan 19
- Jackson L Walker
Jan 19
- Emily C White
Jan 28
- Grayson H Cvetkovic
Feb 13

Automated Benefit Enrollment

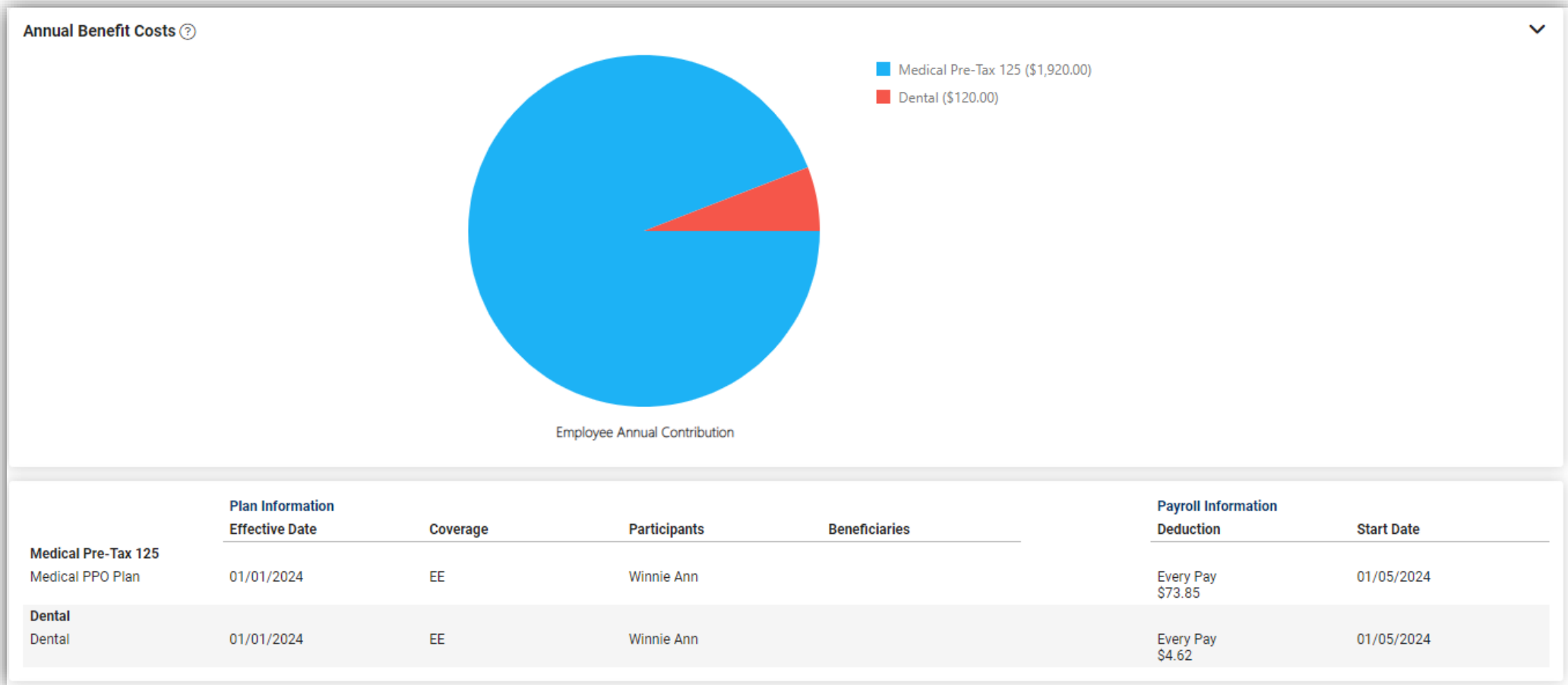
The screenshot displays a web application interface for "Open Enrollment 2023" with a 122-day deadline. The interface is divided into several sections:

- Left Navigation:** A sidebar with four main steps: 1. Enrollment information (Welcome, Beneficiaries and Dependents, Health and Wellness), 2. Preview (Cost Analysis), 3. Plan selections (Medical Pre-Tax 125, Dental, 401(k)), and 4. Final review (Review and submit).
- Main Content Area:**
 - Medical Pre-Tax 125:** Shows "Plan selections" for a "Medical PPO Plan" by Highmark. It includes coverage options (EE, EE+SP, EE+CHILD, EE+FAMILY), a per pay amount of \$73.85, and a frequency of "Every Pay". A table lists a covered participant, "Winnie Ann".
 - Medical HDHP:** A section for another Highmark plan with a "Select Plan" button.
 - Waive Coverage:** A button to waive coverage.
- Right Side Panels:**
 - Elected Benefit Costs:** A table showing costs per pay, month, and year.

	Per Pay	Per Month	Per Year
Medical Pre-Tax 125			\$73.85
Dental		\$4.62	
401(k)		\$0.00	
Total			\$78.47
 - Messages:** A "Benefits Enrollment" message box with a "Documents" link and a note that there are no documents to review.

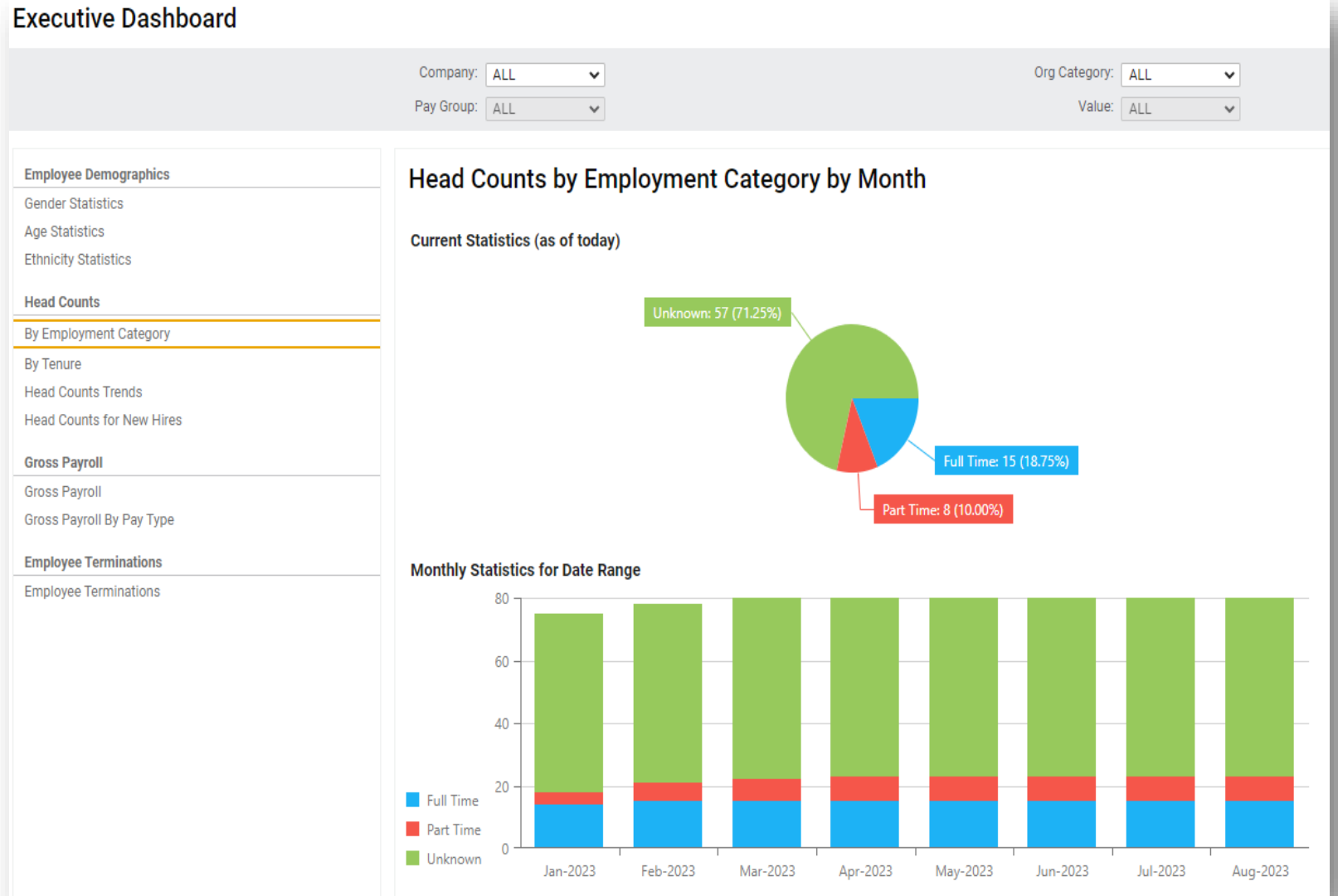
- Benefit management
- Benefit cost analysis
- Automated open enrollment
- ACA compliance
- Life event / FMLA administration
- FSA/HAS/HRA
- COBRA integrations
- 401(k) integrations

Total Rewards Benefit Summary



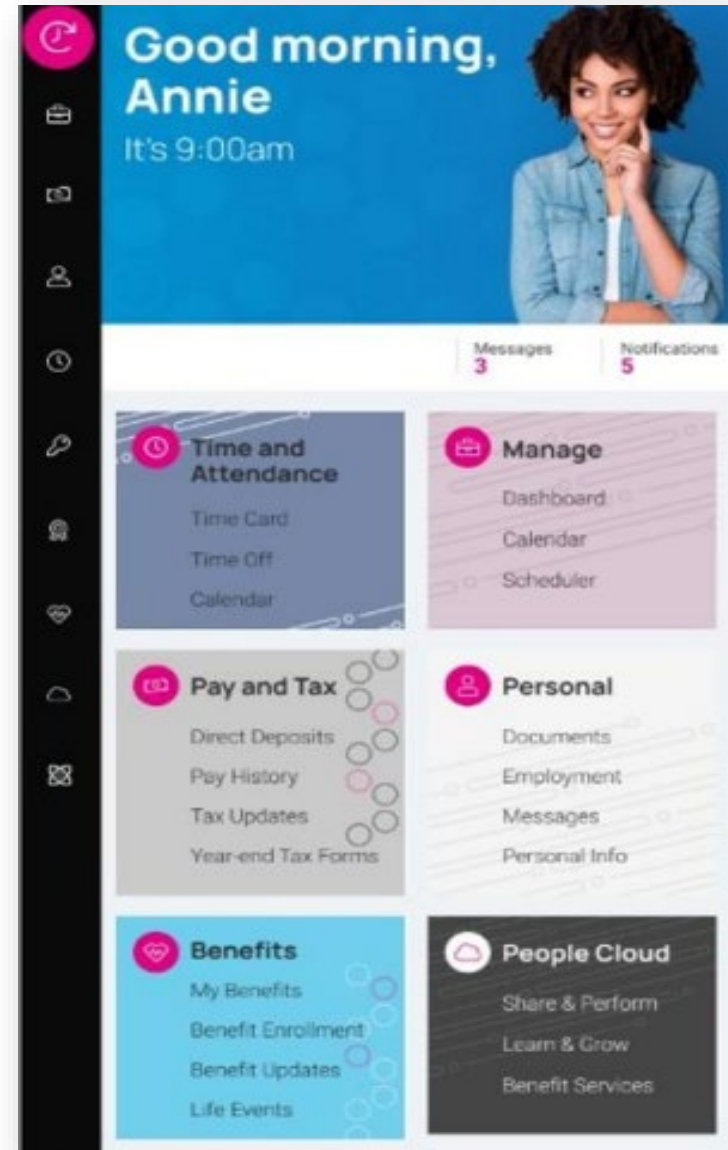
Strategic HR Management

- At-a-glance reporting information
- Dashboards providing demographics
- Provide strategic support to leadership



Employee Self-Service

- Access to W2, paystubs
- Ability to update personal information electronically
- Reduce errors in workload
- Improve data security
- Streamline time off requests
- Improve visibility for time off balances
- Simplify employee benefits management
- Increase employee engagement



POLLING QUESTION

To be eligible for CPE, 3 polling questions must be answered.



System Selection Q & A

What Makes A Good HRIS/Payroll Solution?

Accessibility

- Access anywhere (cloud-based, mobile app)

Ease of Use

- User friendly
- Intuitive

Employee Life Cycle Management

- Customizable

Streamlined Onboarding

- From job posting to new hire

Payroll and HR Management

- Access anywhere (cloud-based)
- Customized reports

Fully Integrated System

- Can grow with your organization

How Do We Begin Vetting HRIS/Payroll Solutions?

1

Gather a team of key stakeholders: HR, Payroll, Finance, IT, Key Leaders, etc. for input and involvement in the vetting process

2

Conduct a needs assessment and gap analysis of your current processes and procedures

3

Identify several solutions you want to consider

4

Begin exploring the selected HRIS vendors and compare their capabilities against your needs assessment for alignment

5

Narrow your HRIS vendors down to the top 3 and arrange for onsite demo of the software

What Should We Consider When Conducting a Needs Assessment?

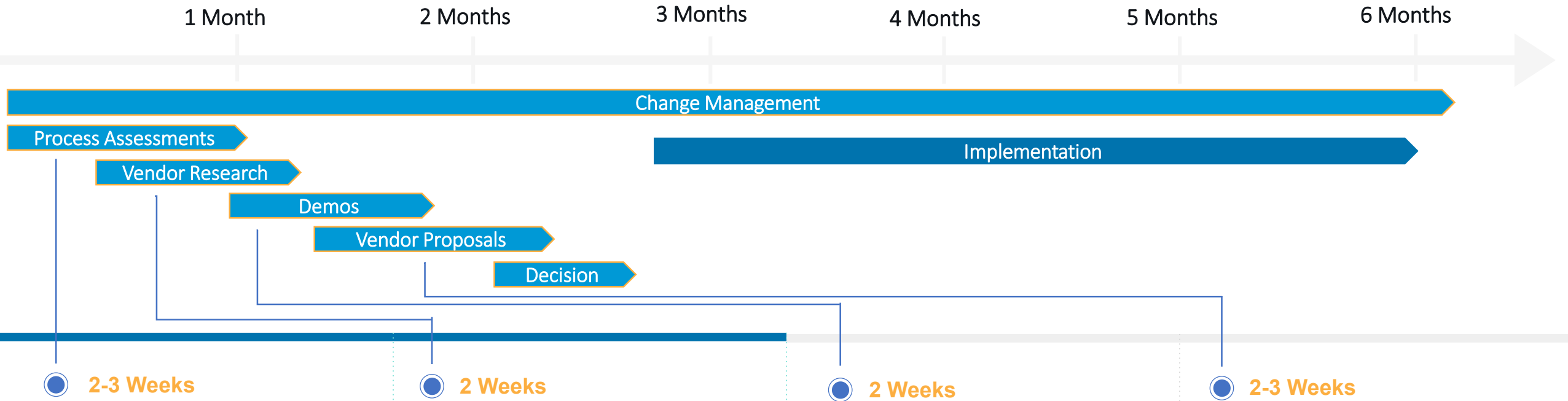
- Analyze your business workflow and processes. What areas can be automated?
- Assess what you are doing manually.
- Are you using Excel, Word, paper, etc. for tracking or collecting information?
- Where are you currently storing information needed to do your job efficiently?
- What data do you need at your fingertips to do your job strategically?
- What are your organization's needs, growth trajectory and long-term goals?
- How can an HRIS/Payroll solution improve your current procedures?
- Draft a needs and wants list.



How Long Does It Typically Take To Identify and Implement a HRIS/Payroll Solution?

Depending on the size of your organization and your needs and wants list, the timeline will vary. In general, you can expect to spend several weeks to months identifying and vetting vendors and then another several months on implementation.

HRIS Selection & Implementation Timeline



Processes Assessment

Review current HR/Payroll processes to identify strengths, potential compliance concerns and inefficiencies. Implementing a new system is a perfect time to make changes and actualize ideal future processes. This assessment allows us to develop a complete Wants & Needs list to ensure HRIS vendors fit your company's industry, size, structure, and processes.

Preliminary Vendor Research

Using the Wants & Needs list, we will develop a custom Request for Information questionnaire for contending vendors. Through this preliminary information as well as our experiences and contacts, we will identify possible HRIS vendors that fit your Wants & Needs.

Demos

We will work with your key staff to schedule and participate in demos of the chosen HRIS systems. We will create a scorecard customized to your company's Wants & Needs to guide your assessment of each vendor.

Vendor Pricing Proposals & References

We will collaborate with vendors to ensure pricing proposals are fair and easily comparable. We will also contact a minimum of three vendor-provided references that are similar to your industry.

HRIS Selection & Implementation Timeline

1 Month

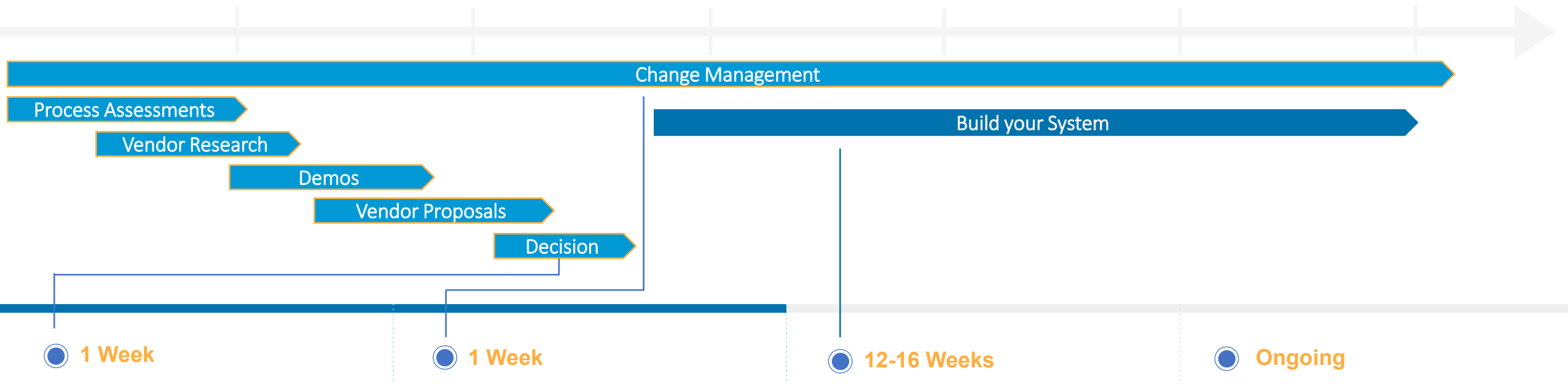
2 Months

3 Months

4 Months

5 Months

6 Months



Choose the Vendor

We will create a report that summarized the results of the scorecards and references. This, along with the pricing proposals, will provide you with the information necessary to make a decision.

Build a Communication Plan

We understand change can be uncomfortable and alarming. Transparent and frequent communication can determine the reception and outcome of change. We will work with your team to develop a communication strategy to staff members.

Build your System

The Vendor will provide a list of necessary discovery documentation to RKL. We will ensure the system is built as you specified through verifying and testing the system.

Transactional to Strategic

Your HRIS system is fully functional!

Your human capital management processes are now more strategic and less transactional!

POLLING QUESTION

To be eligible for CPE, 3 polling questions must be answered.



Change Management

CHANGE EVOKES FEAR

RUMORS OF CHANGE

SELF DOUBT

FEAR OF UNKNOWN

NOT HAVING A SAY

FEAR OF FAILURE



FEAR OF LOSS

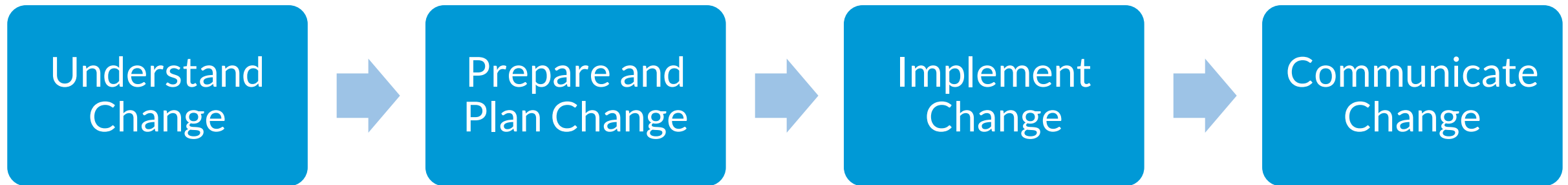
FEAR OF UPSETTING OTHERS

LEAVING COMFORT ZONE

GUILT

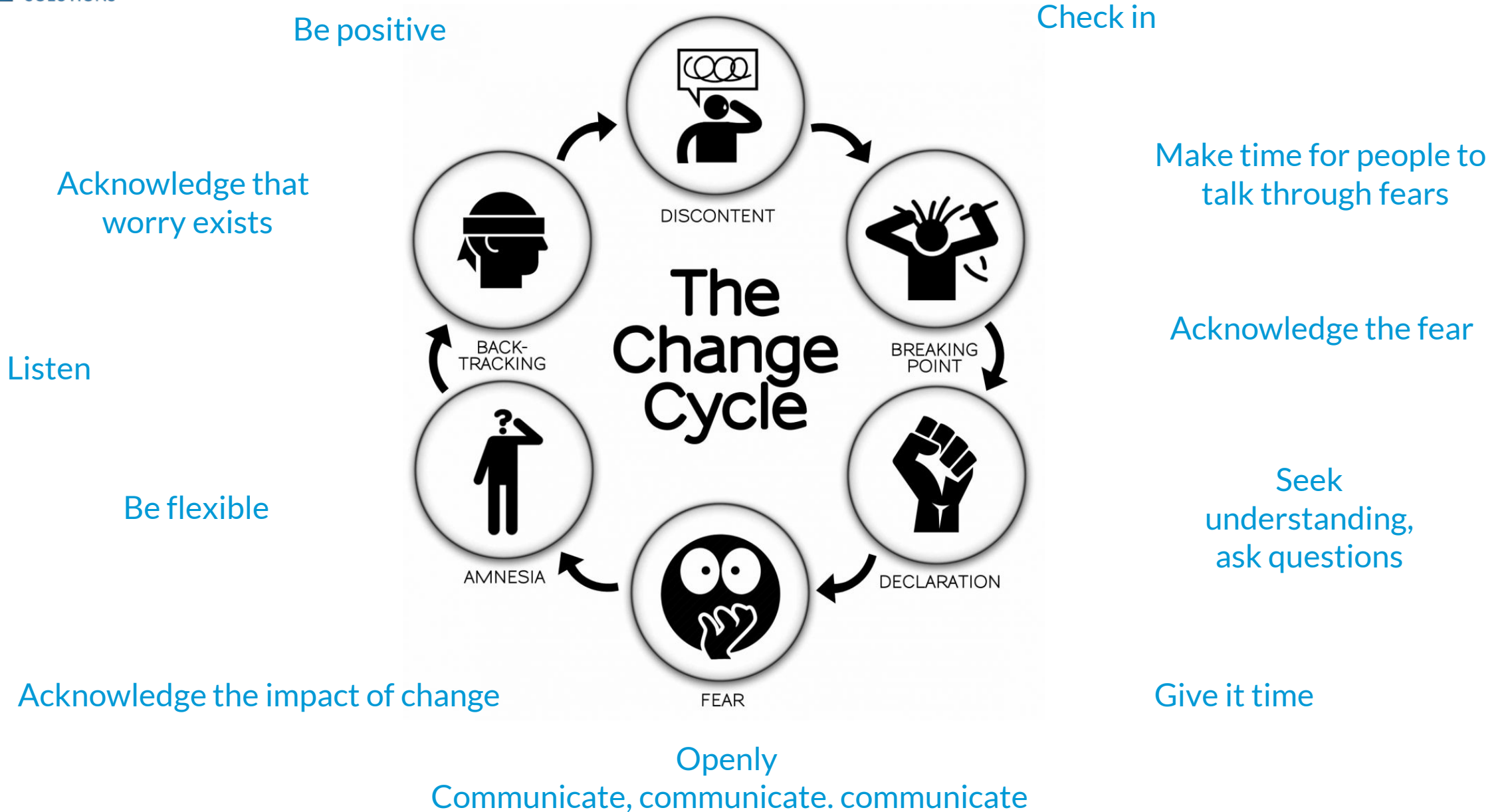
FEAR OF SUCCESS

| Change Management



“Go Live” Change Management

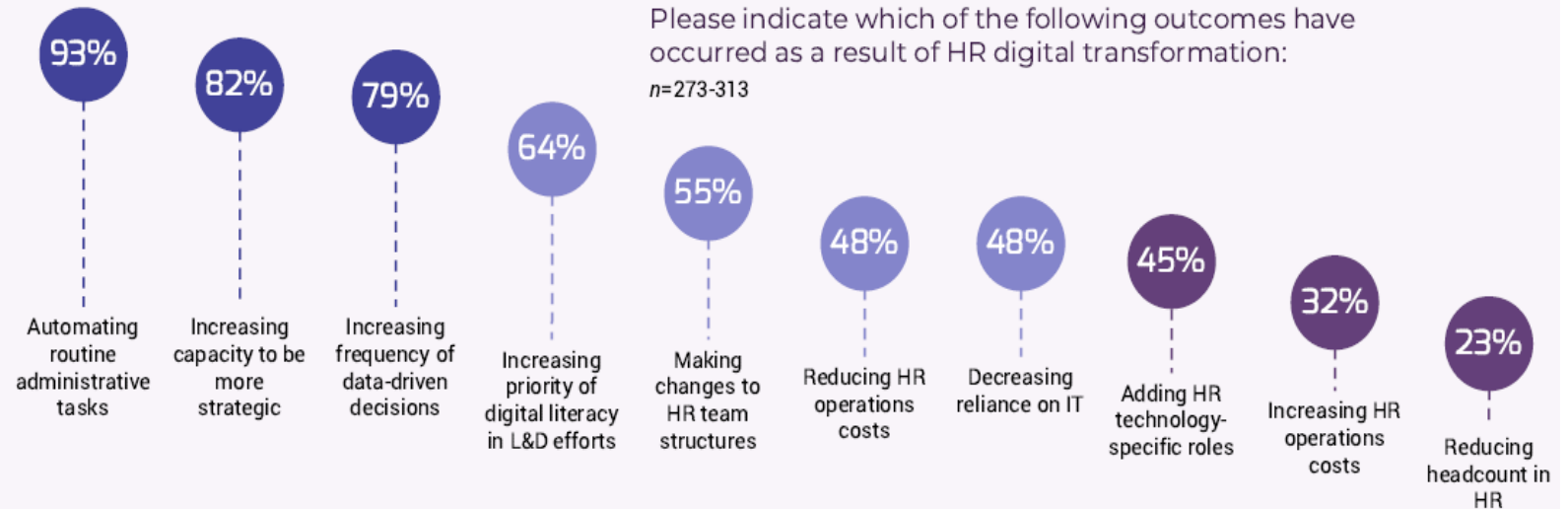
- Leverage Key Stakeholders
 - Communicate the vision, process and goals and ask for support through the process
- Develop a Training Plan
 - When will you deliver training? What is the content? How will it be delivered?
- Train Power Users
 - Utilize power users for assistance with company rollout and consistent messaging
- Provide Adequate Training That Offers Multiple Formats
 - Classroom, group, online, hands-on, self-paced, blended
- Include Job Aids
 - Handouts, video resources, “how to” guides, on-call help desk



HR of the Future

- Transformed HR practices by leveraging technology
- Improved quality of service
- Increased capacity
- Reduced HR operational costs
- Strategic HR management through optimized analytics and data
- More time for initiatives that benefit the organization and employees
- HR team works efficiently
- Improvements through integration and centralization of data
- Involved in planning and executing organizational strategy

Digital transformation enables HR to be more strategic



Top outcomes are directly tied to HR's strategic capabilities.

The top three reported outcomes of digital transformation have clear links to HR's ability to be more strategic. Automating administrative tasks frees up capacity for HR to focus on more strategic activities, and digitization allows HR to better leverage data in strategic decision making.



1.2x
n=743

HR departments that report they have gone through digital transformation are 1.2x more likely to report they are a partner in planning and executing strategy for their organizations.

POLLING QUESTION

To be eligible for CPE, 3 polling questions must be answered.

Do You Have Questions?



| Save the Date

**Wednesday, December 13 at the
Lancaster Marriott**

Annual Update and
Workforce Strategies Sessions

Take the first step in your HR and payroll automation journey with

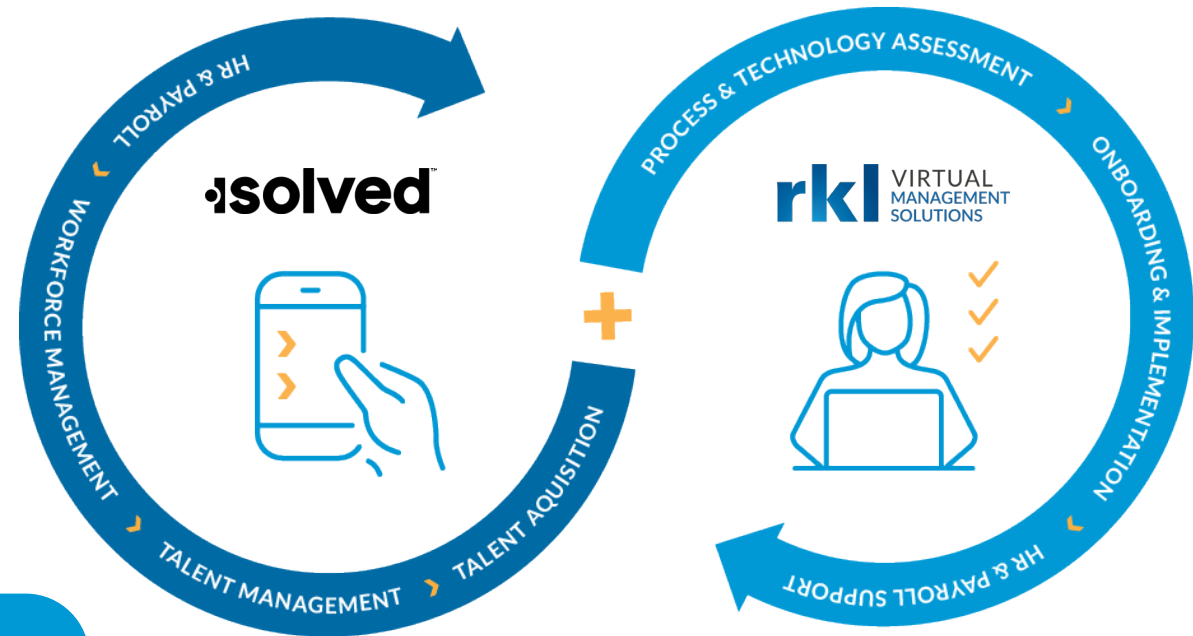
RKL's HRIS Solution, powered by iSolved

- Powerful, best-in-class HCM and payroll technology
- Our team provides expert onboarding, implementation and ongoing support

Schedule a Discovery Session Today

Now through October 15, we'll waive onboarding fees for HR, Payroll and Time & Attendance modules!

Visit rklcpa.com/HRIS





VIRTUAL
MANAGEMENT
SOLUTIONS

A photograph of three people in an office setting. A woman on the left, wearing glasses and a black top, is leaning forward and high-fiving a man in the middle. A woman on the right is also high-fiving the man. They are all smiling and appear to be celebrating. The background shows large windows with a view of a city.

Thank you for joining us

Whatever your next move, we're here to help.

DISCLAIMER: The presenters and RKL LLP and its subsidiaries/affiliates are not held responsible for information that has changed or will change and makes no representation or warranty as to the ongoing accuracy of the information presented orally or in writing. Attendees should consult with legal, accounting and other advisors