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Welcome to the SIG University Webinar Series

HR Tech: Planning & Execution in 2021

John Tunney | *SIG*

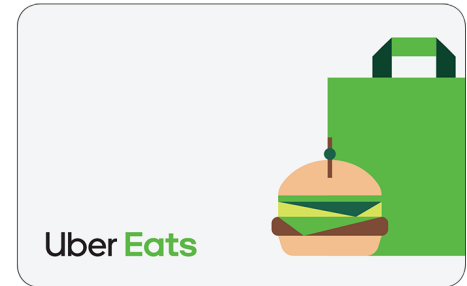Stacey Davis | *ADP*

Katy Rabitor | *Designers Insurance*

March 16, 2021

Reminders

1. Slides and resources will be emailed after the webinar and are available on **silbs.com/events**

2. Complete our 2-minute post webinar **SURVEY**** All attendees will receive an UberEats gift card.

UPCOMING

[How Advanced Strategies Address the Rising Cost of Healthcare](#)
March 18th, 2 PM – 3 PM EST

[2021: What's On Your HR Radar Screen?](#)
March 25th, 11 AM – 12 PM EST
Presenters: Amy Polefrone, MPA, SPHR, SHRM-SCP, and Donna Miracle, SPHR, *HR Strategy Group*

[Roadmap to Mental Well-being: Best Practices for Supporting Employees](#)
April 29th, 11 AM – 12 PM EST
Presenters: Jessica Scheffield, *Brightview Senior Living* and Beth Thierer, *BHS*

Webinars

HR Tech: Planning & Execution in 2021

Agenda

- Introductions
- SIG | Alera Group HR Tech Capabilities
- Panel Discussion & Case Study
- Q&A with ADP/Alera Group Client
- Final Q&A

Presenters

John Tunney

Alera / SIG

VP, HR & Benefits Technology
Consulting

Stacey Davis

ADP

Broker Relationship Manager -

Major Accounts

Katy Rabitor

Designers Insurance

HR Manager

Questions?

During the webinar if you have any questions, please feel free to…

💬 Zoom Chat: Enter questions via the "Chat" feature in the Zoom meeting

SIG | Alera Group - HR Technology Services & Support

▶ Access to Benefit Technology Resources (BTR) – HR Technology Consulting

▶ Outsourced Benefits Administration

▶ ACA Reporting services and support

▶ Access to Alera Group's National Partnerships with HR Tech vendors (e.g., ADP): includes escalated support for benefits administration (and other modules) and discounts on service fees (e.g., EDI set-up costs waived, etc.).
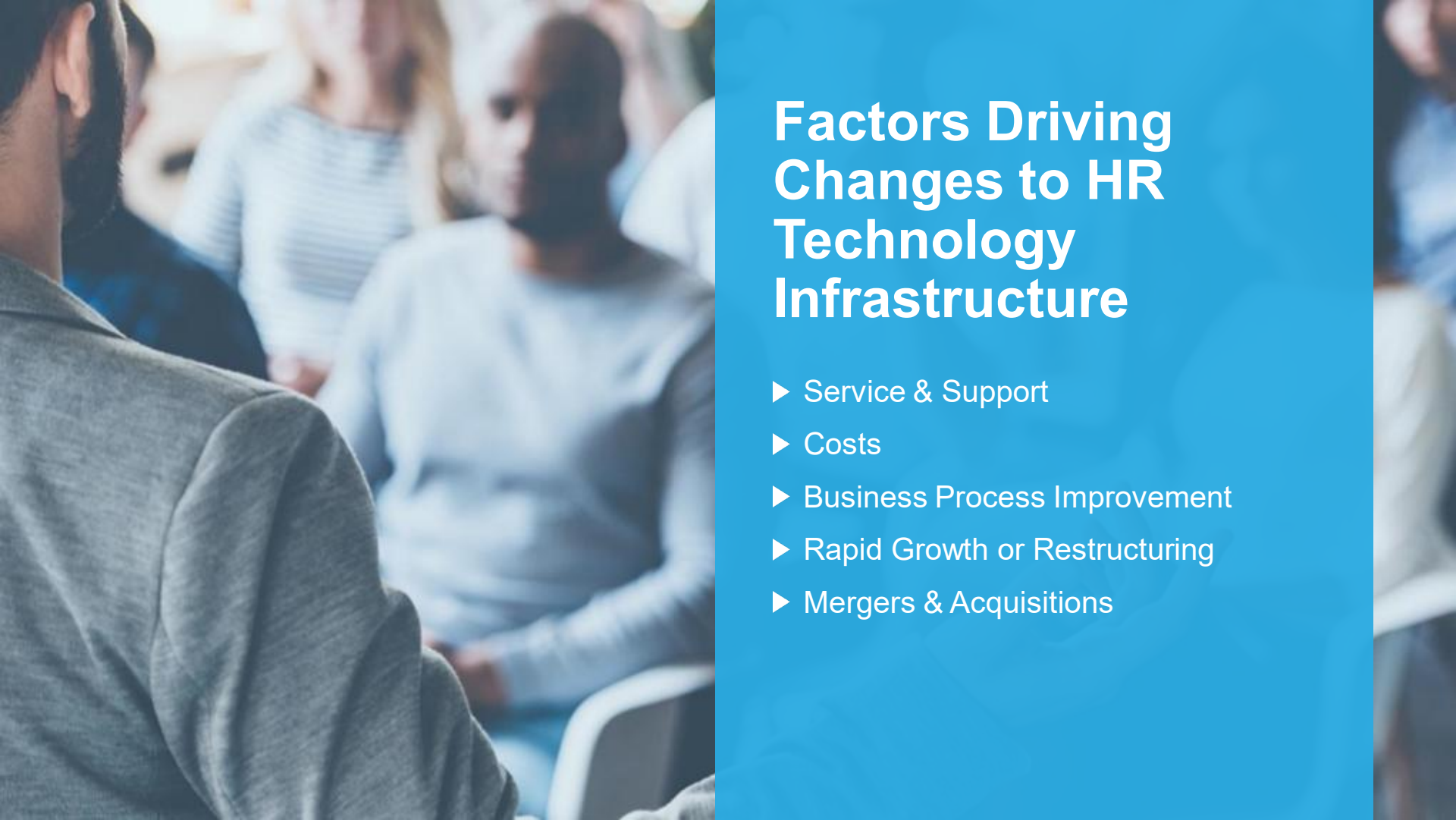
HR Technology Consulting

How We Work

A technology expert will be by your side to walk you through our consulting processes every step of the way. Each client is unique, and we will customize your engagement to fit your organization's needs. We offer a variety of services to support your goals.

Technology Analysis Services Our experienced team can review your current HR technology pricing and utilization	RFI and RFP Services Optimize your time and resources by letting us manage your RFI and RFP projects	Vendor Assistance Services Escalate and address issues on your behalf with a current vendor
Identity inefficiencies and gaps within your existing tech	Draft, manage, and overseas the RFI or RFP selection process for a new vendor	Attend calls with your current tech vendor as an independent third party
Audit pricing to confirm you are receiving a market competitive rate	Create customized pricing and vendor comparison documentation	Leverage our vendor escalation contacts to expedite resolution
Offer recommendations to help you make the most of your vendor relationship	Review your choses vendor's contract and provide best practice recommendations	Support implementation by acting as a project manager on your behalf

HR Technology:
2021 Planning & Execution

Factors Driving Changes to HR Technology Infrastructure

▶ Service & Support

▶ Costs

▶ Business Process Improvement

▶ Rapid Growth or Restructuring

▶ Mergers & Acquisitions

HR Technology Vendor Service Offerings

▶ Professional Employer Organizations **(PEO)**: typically not encountered with groups > 50 because of high costs and companies desire to develop internal culture, which the HR organization helps drive. Less prevalent in MD due to state regulations. Option for smaller organizations with distributed (multi-state) work-force.

▶ Outsourced Benefits Administration & Compliance: step-up in payroll vendor service fees with expected savings from reduction in HR administrative costs.

▶ Payroll and related HRIS/HCM modules administered internally by HR staff and self-serve (Time & Attendance, PTO, open enrollment, etc.) by employees.

- ▶ Single Point of Contact
  - Pros / Cons
- ▶ Team Approach
  - Pros / Cons
- ▶ Call Center (1-800 Customer Service Line)
  - Pros / Cons

Levels of Service & Support

Vendor Pricing

Number of employees pricing is based on:	PEPM PRICING ESTIMATE *Please note: The below figures are estimated pricing only; fees are subject to compatibility and modules deployed*	
	Under 1,000 Employees *Assumes 1 payroll frequency and 1 FEIN*	Over 1,000 Employees *Assumes 1 payroll frequency and 1 FEIN*
SETUP FEES		
Technology Implementation Fee	$5,000 - $15,000	$50,000 - $100,000+
One-Time EDI Setup Fee	$1,500 - $2,500 *Per carrier file feed*	$1,500 - $2,500 *Per carrier file feed*
Conversion Fee (YTD Data)	$0 *Typically included*	$0 *Typically included*
Training Fee	$0 *Virtual training typically included*	$0 *Virtual training typically included*
ONGOING FEES		
Recruiting/Application Tracking	$1 - $2 PEPM	$2 - $3 PEPM
Onboarding	$1 - $2 PEPM	$1 - $2 PEPM
Payroll	$6 - $8 PEPM *$50 - $150 Base Fee*	$12 - $14 PEPM *$50 - $150 Base Fee*
HRIS	$1 - $2 PEPM	$2 - $3 PEPM
Time & Attendance *Excludes Clock Hardware*	$3 - $4 PEPM	$2 - $4 PEPM
Benefits Administration	$3 - $4 PEPM	$2 - $4 PEPM
Compliance Reporting (ACA)	$1 - $2 PEPM	$1 - $2 PEPM
Performance Management	$1 - $2 PEPM	$2 - $3 PEPM
Learning Management	$2 - $3 PEPM	$2 - $3 PEPM
Business Intelligence / Reporting Dashboards	Typically Included	

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Business Process Improvements

▶ Implementing an updated or new HR Tech Strategy
- Replacement of Existing Systems/Modules
  - Best of Breed vs All in One
- Implementation of New Modules
  - Applicant Tracking
  - Onboarding
  - HR
  - Data & Analytics
  - Timekeeping
  - Benefits Administration
  - Performance Management
  - Learning Management

Recent Case Study – Financial Institution

▶ Scenario:
- Client was on a legacy in-house platform
- Seeking a single vendor with a fully integrated, scalable solution including:
  - Payroll
  - Talent Acquisition/Applicant Tracking
  - Timekeeping
  - HR
  - Benefits Administration
  - Performance & Compensation Management
  - 401k 360 integration
  - Data & Analytics
- Timeline was to be up and running by first payroll in Q3 (July)

- ▶ Key stakeholder involvement:
  - HR
  - Finance/Payroll
  - Operations Management
  - IT (security)

Team Involved and Dedicated Resources

Due Diligence

▶ Sample Questions

- Will you be providing a project management plan to us on the implementation?

- How mobile friendly is your system/platform? What features does the mobile app contain that are user friendly? Can you send a flyer on the app? Is there training?

- Can you provide us references within our industry to contact?

- What additional costs would we incur if we expand or acquire business units into other states?

- What integrated service providers and costs are there for flex benefit options?

- How long do my discounted rates apply on recurring services?

- Are your modules all on the same platform or are they different systems talking to each other on the back end?

- Are there any charges for software updates or upgrades? How often do they occur? How long do they take? What systems go down during an update? Are we getting the latest version on all modules?

Overall Timeline

Late January — Updated proposal

February — Several Demos to different stakeholders

March — Service Agreement and Final Proposal
Project timeline and project team alignment
Kick-off call

April — Platform Module Configurations (Payroll, Time & Attendance, HR & Benefits)

May — Initial walk through of configured system
Instructor Training Module development

June — System Fine Tuning / Live Training
Final walk through and payroll testing
Historical Data Conversion

July — First Payroll and Transition to Service

Client Discussion with Designers Insurance

Introduction & Panel Discussion

- Tell us a little about your role and your company.

- What drove your decision to make changes to your HR Technology?

- Did you add, replace or upgrade? Did you implement everything all at once, or do a phased approach?

- Tell us about your experience

  • What went well about your process for making the change

  • What would you change in your process

- Can you tell us about your results?

Have Additional Questions?

John Tunney, Alera

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