



isolved™

Pulse Deck

September 2023

- Training and Information Videos
- isolved Announcements
- Compliance Corner
- Isolved Surveys
- Isolved Newsletter
- isolved Customer Roadshows!
- isolved People Heroes
- How can isolved help?
- What's New?

Agenda



Check out live training and informational videos

Check out The LIVE webinar schedule: [FREE Live Training Webinar Calendar](#)

[Fall Webinar Series - Scalability of HR Services](#)

[September 19, 2023 from 1:00 – 2:00pm EST](#)

Join us for our Fall Webinar Series – Scalability of HR Services Webinar, to learn about our comprehensive service packages that make organizations more productive—regardless of size or industry. Our augmentation packages are scalable—so whether you’re a small business looking to stay in compliance with local regulations or a multi-state organization juggling large projects, we’ve got the resources you need to bolster your HR function.

[HR Planning for FY24: Business as Unusual](#)

[September 27, 2023 from 10:00 – 11:00pm PST](#)

It’s time to pause to think about the year ahead. What changes do you want to see and, more importantly, what are the results you (and your organization) need to experience as a result? Whether it’s a people-strategy change, a structural change, a technology change or an experimental change, the processes to be agile in the way you plan, bring everyone onboard and get the organization ready for it, remain the same. And there is absolutely no better time to start than right now.

Join this Q&A session to hear from organizational agility expert and industry analyst, advisor and influencer Steve Goldberg on how to enact, enable and embrace change at your company – regardless of size or type.

[Fall Webinar Series - Benefits Services](#)

[September 28, 2023 from 1:00 – 2:00pm EST](#)

Join us for our Fall Webinar Series - Benefits Services Webinar, to learn how you can stay compliant while giving employees the benefits they want and need. We cover topics like evolving regulations, availability in benefit offerings, broker relationships, and systems for managing employee access continue to get more complex. isolved offers a dedicated team of experts to help you streamline end-to-end benefits administration and allow your internal resources to add more value back to your business.

3 Reasons to Automate Open Enrollment with an Intelligently Connected Platform

Increase productivity

An intelligently connected platform allows benefits enrollment and administration to integrate flawlessly with payroll, HR and other core processes. Automation enables benefits to be calculated accurately based on employees' information and compliance regulations are handled without the need for manual input. Premiums are calculated automatically based on enrollment details and subtracted from payroll without error or delay. With this burden out of the way, your HR team can focus on more strategic initiatives.

Empower employees

Every interaction an employee has with their employer affects their experience, including how they elect benefits. A streamlined process makes a good impression on your workforce. 30 percent of employees say the ability to use technology that's connected to anything else HR-related is an important feature for benefits enrollment.

Artificial Intelligence (AI)-powered tools are on the rise and can create a more personalized enrollment experience without employees having to interact with HR. According to our [AI at Work whitepaper](#), employees are open to the idea. 68 percent believe AI will improve the employee experience and 66 percent would look favorably upon employers that use it.

Get a competitive advantage

While the benefits of using an intelligently connected platform are indisputable, most employers aren't leveraging it. According to [our survey](#), only 47 percent of employees say they elect benefits electronically through a platform that's integrated with other HR tasks. Providing this experience can give your organization a competitive edge.

Download
our [2023
Guide to
Open
Enrollment](#)

64 percent of employees say a poor enrollment experience could lead them to look for a new job



Benefits Enrollment & Administration through isolved People Cloud brings:



Organized enrollment



Increased employee engagement with proper checks and reporting simplifying the open enrollment period



Employee self-service, allowing employees to review options and enroll in benefits from anywhere at any time



Ease enrollment for your employees with easy benefit cost comparisons

Benefits Enrollment & Administration

Fully optimize the way you manage benefits!

Benefits enrollment can be a sore spot for HR and benefit managers. Filling out election forms and manual data entry tends to take a lot of time. But with isolved, benefits enrollment has never been easier. The robust human capital management (HCM) system allows you to set up all benefit plans at once, driving enrollments and deductions throughout the system.



Benefits Enrollment & Administration
Short 7-minute video

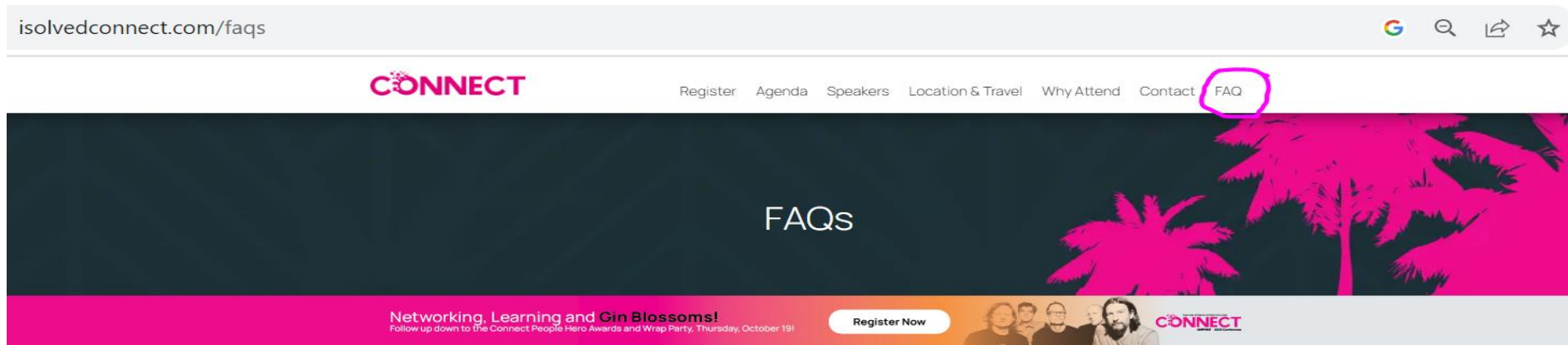
Why should you attend Connect 2023?

isolved Connect 2023: Reasons Why You Should Attend

- Networking, With Like Minded Individuals
- CE Credits, Advance your Skillset
- Meet isolved Experts, Work Directly with isolved Experts
- Hands-On, Get Valuable Product Guidance
- Roadmap, Sneak Peek of isolved Planned Updates



[Register Here](#)



We're here to answer all your questions. If you don't see the answer you're seeking below, please feel free to email us at isolvedconnect@isolvedhcm.com.

Justification Letter



Who should attend isolved Connect?

isolved Connect is an event for people who use isolved! It's the largest gathering of the isolved community, packed with hands-on education opportunities, CE credit classes, best-practice discussions, and all kinds of hacks to help you make the most out of the isolved platform. You'll come away with practical and game-changing advice that will improve how you are leveraging isolved for a better today, and a better tomorrow.

[Justification Letter](#)

Why should you attend Connect 2023?

isolved Connect 2023: Keynote Speaker



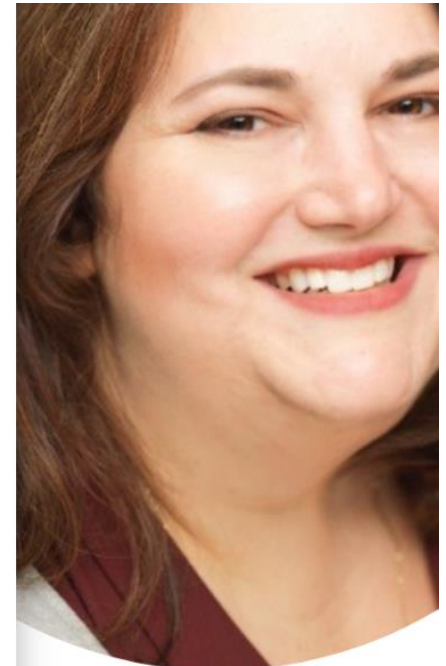
[Register Here](#)

Stacey Harris

Chief Research Officer, Managing Partner of Sapient Insights Group

Stacey Harris is the Chief Research Officer, Managing Partner of Sapient Insights Group where she oversees their industry research work, including the esteemed Annual HR Systems Survey and White Paper, now in its 24th year. She has been a leading member of the HR practices and technology research community since 2007, producing groundbreaking research on high-impact HR organizations, enterprise HR technology, and key practices across the talent management spectrum.

Stacey held executive-level roles with Sierra-Cedar, Bersin & Associates, and Brandon Hall Group, and worked as an industry advisor and HR leader for multiple fortune 100 organizations around the world. Stacey is frequently included in Human Resource Executive® and the HR Technology Conference's Top 100 HR Tech Influencers list and sits on the International Human Resource Information Management (IHRIM) Board of Directors, overseeing strategy and education in her role as Vice-Chair. Stacey holds MA and BA degrees from Kent State and Ashland University in Education and Communications and is a certified Human Resources Information Professional (HRIP) from IHRIM.



Power Positions

Our **five new pillars of differentiation:** the “why isolved?”

Increase Productivity with an Intelligently Connected Platform

Eliminate admin and added work to get more time back in your day and focus on the things that really matter

Ensure Performance with isolved Employee Experience by Design™

Spend less time on support and technical issues while ensuring your employees can spend more time being productive

Accelerate Decisions with isolved Analytics Everywhere™

Make better, faster and more informed decisions with deep actionable insights on every aspect of your business

Energize Talent with isolved People Heroes World™

Energize your talent to grow and hone their skills, increasing satisfaction and boosting growth throughout their career journey

Reduce Risk with Your Most-Trusted Partner

Having a secure, stable and scalable partner means you're always cared for—with timely, comprehensive support and industry-leading satisfaction scores, we provide peace of mind.



Paperless

Third Party
Sick Pay

HSA

Delivery
Address

Get a Jump on Year End

Spot Lighting: 401k Box 12D

Both employee contributions and employer match to 401k must appear on the W2 in Box 12D.

Best practice: Leverage system functionality so these monies auto-populate on the W2. Contact Customer Support to get this setup if you are not already using this functionality.

Group Term
Life

Personal Auto

401k Box 12D

Stock Options,
Gifts, Awards

Employer Paid
Healthcare
Box 12DD

S Corp
Healthcare
Premiums

Isolved Announcements



SAVE THE DATES
isolved Connect 2023 – October 17 – 19, 2023
Palm Desert, California
Plan your trip here

Quick Links (on landing page)
Be sure to check your Quick Links for updates

QUICK LINKS

- [Android](#)
- [Preparing for a Successful Open Enrollment](#)
- [Training Calendar - Client](#)
- [Employee Direct Deposit Form](#)

Announcement

Register Here To Get Up to Date isolved Release Information
See the Next Slide for a Sneak Peak of the New Compensation Dashboard coming soon

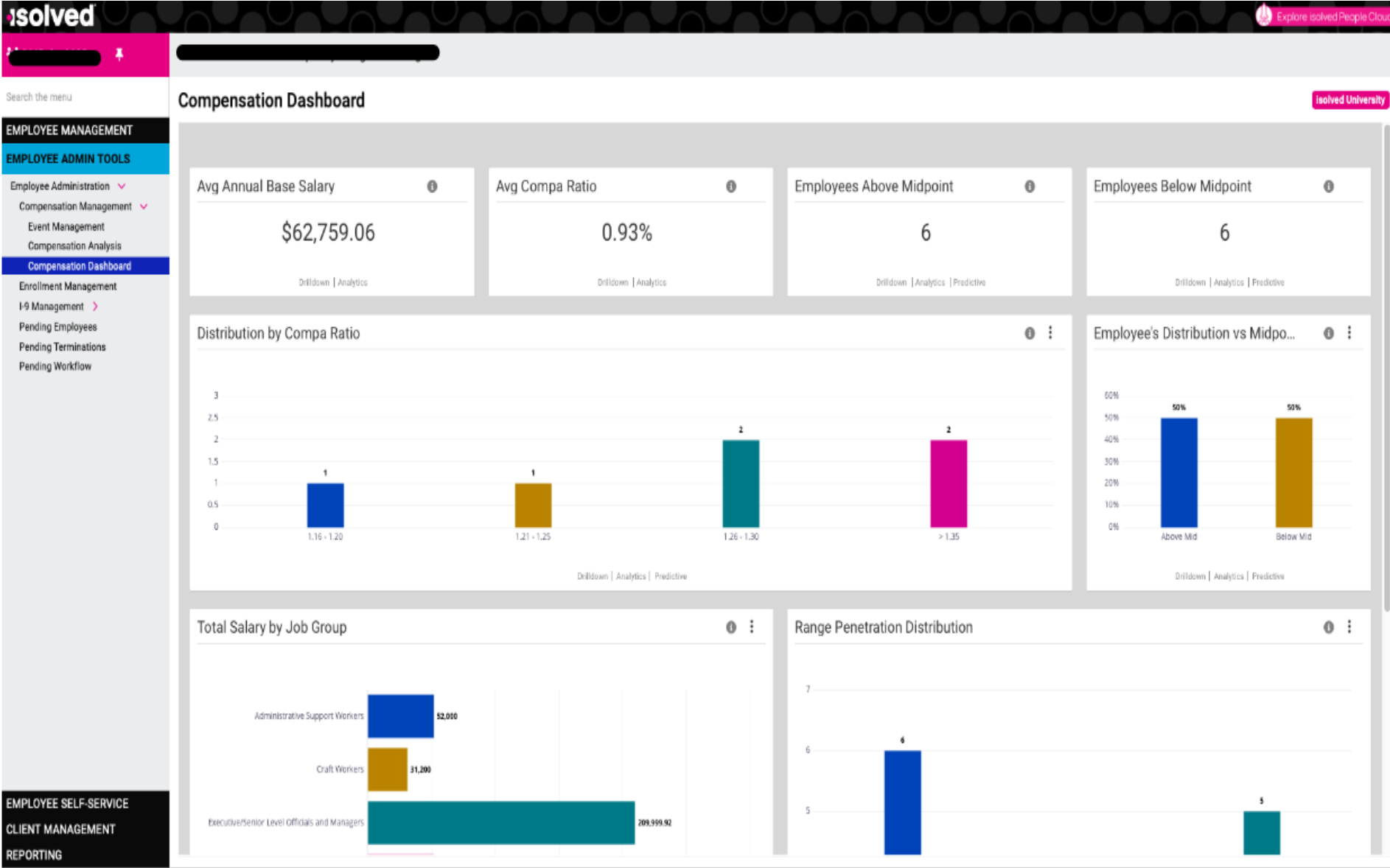
IMPORTANT DATES

Monday, October 9, 2023, Columbus Day/Indigenous Peoples’ Day– Banks Closed

Sneak Peek

Compensation Dashboard

The Compensation Dashboard is tentatively rescheduled to be released with the 9.17 product release. The Dashboard allows users to gain valuable insight into their Compensation data at a glance and gives users a visual representation of their real compensation information.



Customer Experience Survey

We value your feedback.

Be on the
LOOKOUT for your
survey!

Thank you for being
a valued isolved
customer! Your
continued success
is important to us

Please provide
specific details
as we at isolved
are always
striving to be
better than we
were yesterday.

isolved
Customer Experience Survey

Thank you for being a valued isolved customer! Your continued success is very important to us!
This survey will provide insight on your experience with isolved. We will use your feedback to help improve your overall satisfaction.

*
1) Based on your recent experience, how likely are you to recommend isolved to a friend, colleague or business partner?
(1 = Not at all likely, 5 = Neither likely nor unlikely, 10 = Extremely likely)

1 2 3 4 5 6 7 8 9 10

2) What is the primary factor impacting your rating in question #1?
 Customer Support
 Customer Success
 Features & Functionality
 Implementation
 Ease of Use
 People Heroes' Community
 Tax Services
 Treasury / Funding
 Account Management (Sales)
 Price / Value
 Integrations with other systems

3) Do you know who to contact for support and how to reach them?

4) How satisfied are you with your isolved teams' responsiveness to issues or inquiries when you require assistance?
(1 = Not at all satisfied, 5 = Extremely satisfied)

1 2 3 4 5

5) Please provide details to question # 4.
(Are you satisfied with your isolved teams' responsiveness to issues or inquiries when you require assistance?)

/

6) How strongly do you feel your isolved contacts provide helpful, knowledgeable solutions when you require assistance?
(1 = Not at all satisfied, 5 = Extremely satisfied)

1 2 3 4 5

7) Please provide details to question # 6.
(Do you feel your isolved contacts provide helpful, knowledgeable solutions when you require assistance?)

/

August Newsletter

- **Master the Report Writer:** Join the isolved University Training Team on September 21st at 11:00 AM ET for an informative review of Report Writer. This Masterclass gives you the information to create basic and advanced custom reports in isolved People Cloud.
- **Building a Strategic HR Function:** Sapient Insights Group Director of Research & Principal Analyst, Cliff Stevenson, joins the isolved team on September 21 at 1:00 PM ET to help our People Heroes create a path to better business outcomes through strategic HR teams.
- **Competitive Compensation:** isolved Talent Intelligence empowers HR teams to drive greater performance and more equitable compensation choices. Make data-driven decisions through tools that strategize rewards, analyze trends and much more!
- **Benefits of a 401(k):** A 401(k) plan is an important benefit that 81 percent of employees say impacts their decision on where to work. Attract and retain top talent with the help of isolved Retirement and Financial Wellness Services!
- **Compensation Management:** isolved Compensation Analytics brings together the right tools to help you effectively manage your compensation strategy – from industry benchmarks to the ability to model decision outcomes.



Sign Up!

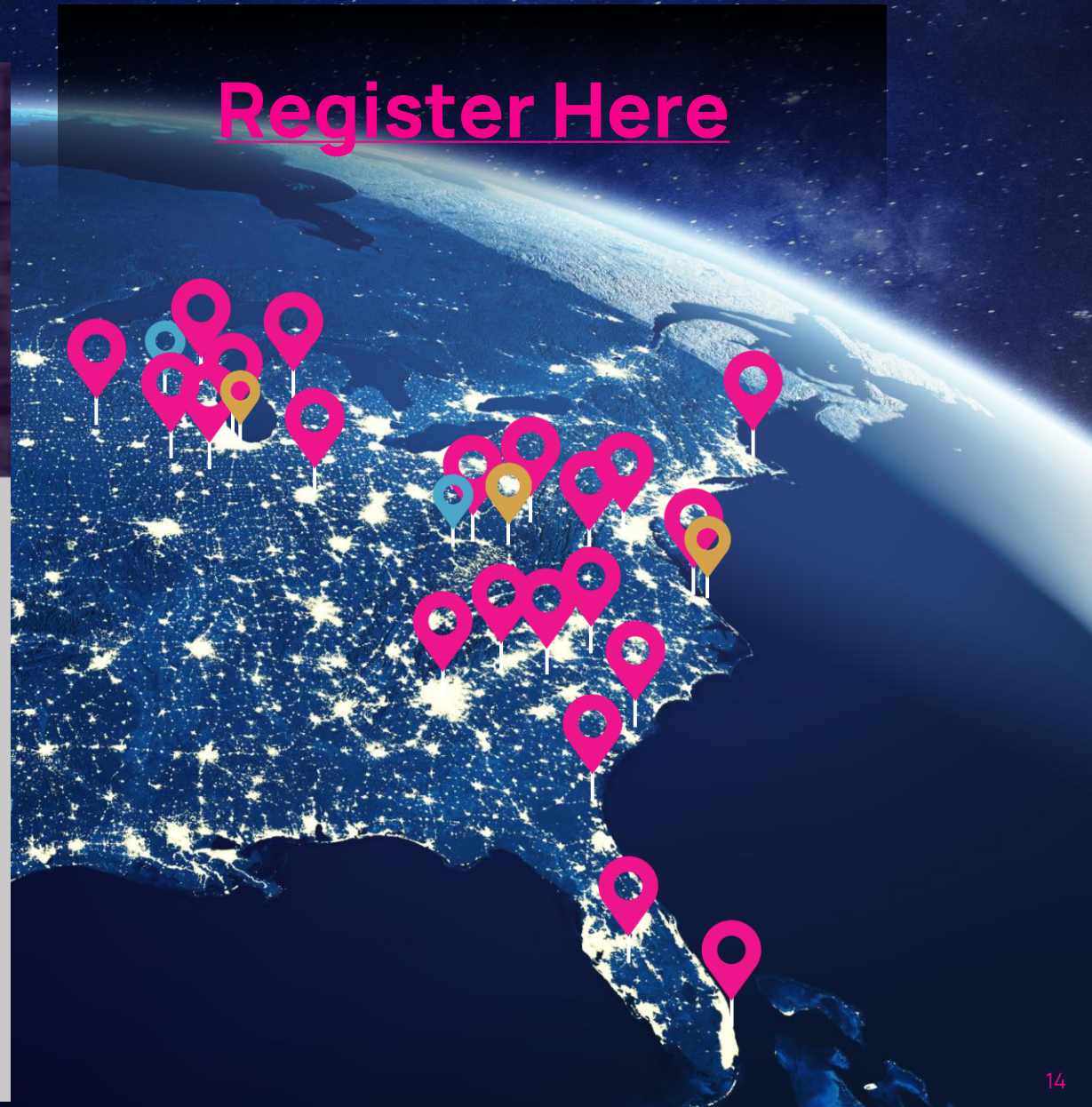


Save The Date!

Upcoming Roadshow Dates:

- | | | | |
|---------------|-------------------|--------------|-----------------------|
| Sept 7 | Omaha, NE | Oct 24..... | Seattle, WA |
| Sept 12 | Schaumburg, IL | Oct 26 | Salt Lake City, UT |
| Sept 14 | Des Moines, IA | Nov 2..... | Dallas-Fort Worth, TX |
| Sept 21 | Phoenix, AZ | Nov 8 | Allentown, PA |
| Sept 26 | Medford, OR | Nov 9 | Philadelphia, PA |
| Sept 28..... | Las Vegas, NV | Nov 14..... | Madison, WI |
| Oct 4 | New York City, NY | Dec 6 | Scottsdale, AZ |
| Oct 5..... | New Brunswick, NJ | | |

[Register Here](#)



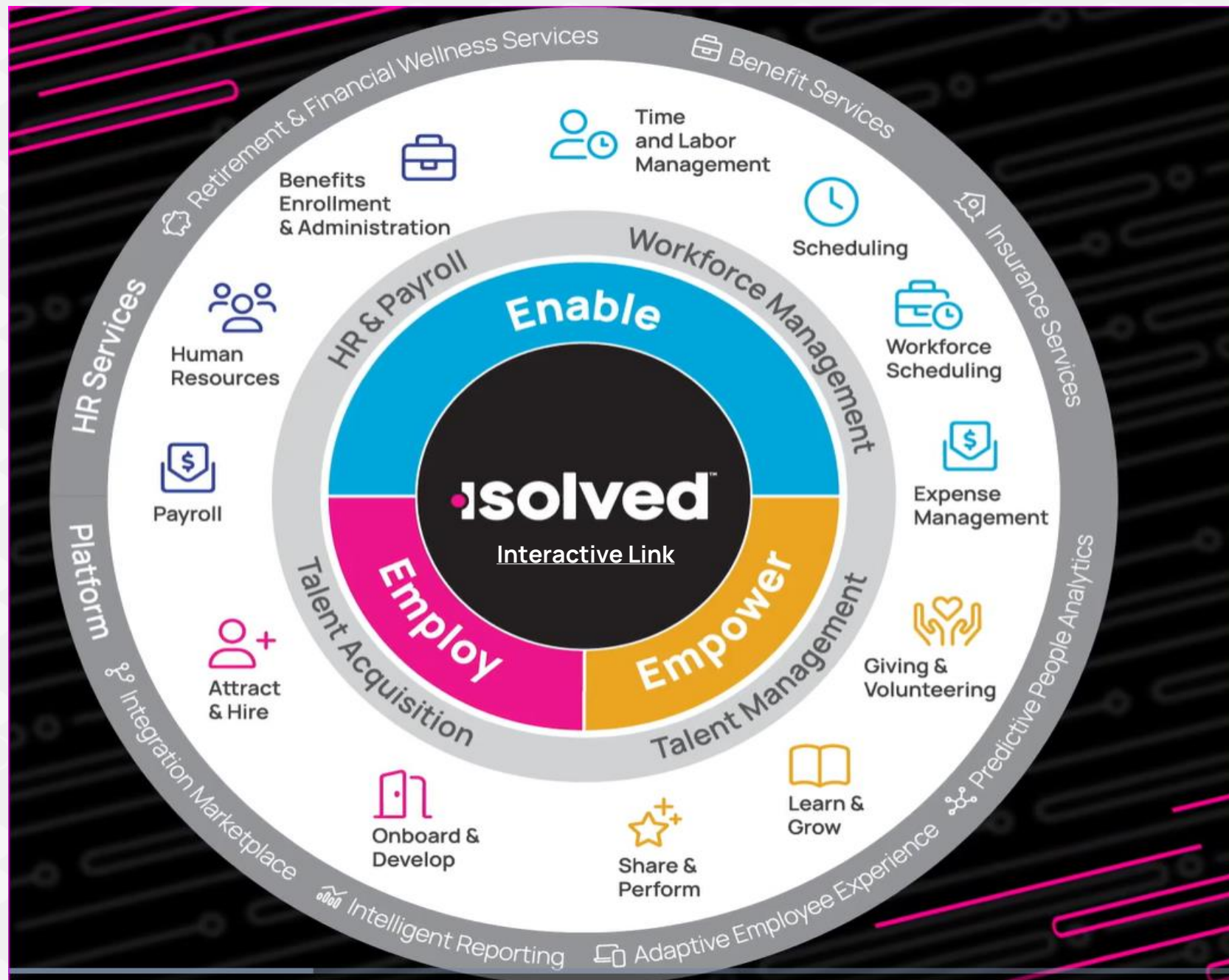
How can isolved help?

Learn more about
what we do.

isolved



3-minute video



Help Your Peers. Elevate Your Career.



isolved
People Heroes

isolved People Heroes brings together like-minded professionals to invest in each other's success and, by extension, their workforce's success.

Join isolved People Heroes to:

- Share your isolved experiences
- Socialize with your HR and payroll peers
- Source advice from fellow people heroes

isolved will help elevate your personal and professional brand by rewarding your good deeds. Rewards for references are just the beginning.

Be a
People
Hero



We value your feedback

Complete all 3 reviews and you will receive a
isolved People Heroes Yeti Water bottle!

All you need to do is complete these 2 steps:

Step 1: Complete all 3 surveys below

Step 2: Send your Customer Success Manager a
confirmation of completion of the surveys.

Links:

[TrustRadius Review](#)

[Software Advice Review](#)

[Software Reviews](#)





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**What's New?
Tell me about your
strategic goals for
2023?**