



isolved™

Pulse Deck

June 2023

Agenda

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



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



Where do I? **On Demand Webinars**

Check out live training and informational videos

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

[Meet Lina Tonk & Mike Flannery: Why Connect](#)

June 6, 2023 at 1:00pm EST

isolved Connect 2023 is right around the corner, and oh do we have quite the conference planned for you. Come hear from Lina Tonk & Mike Flannery on what exciting sessions and surprises we have in for you. See why you won't want to miss Connect this year. *isolved People Heroes Community

[50 State Legal Update: What You Need to Know](#)

June 8, 2023 at 11:00am PST

Across the country, state laws are changing at a dizzying pace. What legislative updates do you need to be aware of? And how do those updates differ across states? In just one hour, you'll get a rundown the major updates across the United States.

Among the many topics to be covered, you'll learn about:

- Minimum wage increases
- New and updated paid family and medical leave laws
- The sunseting of various paid sick leave laws
- And much, much more

[Masterclass: Benefit Reconciliation](#)

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

This survey will
provide insight on
your experience
with isolved. We will
use your feedback
to help improve your
overall satisfaction.

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?)

Screen Updates

Over the next few months, you will see that we have been refreshing several screens. The overall functionality will remain the same with some differences.

Here are the updates:

- Client Management > HR Management > Training and Development > Education: Updated grid layout
- Employee Management > Human Resources > Training and Development > Skills: Add “Date Attained” and “Comments” columns to the grid.
- Employee Self-Service > Skills: Add “Date Attained” and “Comments” columns to the grid.
- Client Management > Workflow Setup > Client User Groups: Add a focus view card to display Client Users, Partner Users and Associated Workflow. Added columns for Client User Count, Partner User Count and Workflow Route Count.
- Client Management > Tables > Worker’s Comp Policies: Updated grid layout
- Client Management > Billing > One-Time Billing: Updated grid layout

Search the menu

EMPLOYEE MANAGEMENT

EMPLOYEE ADMIN TOOLS

EMPLOYEE SELF-SERVICE

Training

Training (New)

Skills

Skills

isolved University

Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Q Search...

Skill ↑	Date Attained	Proficiency	Experience	Last Used	Comments
Eating Scooby Snacks	2/5/2023				
Tiger Training	5/17/2023				Completed Training

Why should you attend Connect 2023?

isolved Connect 2023 Topics
This year we're focusing on:

🔍 Evaluate Next Steps

How do you identify what is next for your company and your department and ultimately show the impact initiatives have on the business? The Evaluate track will give you the language and tools you need to determine your next-best steps, benchmark against peers and understand how to show your work - with real tangible ROI frameworks. Get tips on how to assess your current strategies, including measuring success and finding efficiencies to ensure your enterprise is always prepared for the future.

😊 Educate Your Workforce

Get hands-on training you can take back to your organization and implement immediately to not only refine your own skills, but also the skills of your staff. Maximize your use and knowledge of the software and services you already have with Educate sessions - and learn what could be next for you and your organization.

📈 Extend HR's Impact

The Extend track is rooted in helping you think bigger than your headcount and operating at a level of a much larger team - having an HR team of one, act like 10 and an HR team of three, act like 30. It's wholly possible with automation, augmentation and actual efficiencies.

🌟 Enhance Business Outcomes

Discover the most reasonable and rapid enhancements you can make to reduce risk, automate processes and improve employee experience for your workforce. The Enhance track center around sharpening your focus on what's next. Get tips on how to assess your current strategies, including measuring success and finding efficiencies to ensure your enterprise is always prepared for the future.



[Register Here](#)

isolved Learning Management System (LMS)

Bring together learning in one LMS platform that is part of your HCM solution – delivered anytime, anywhere.



Includes short videos, gamification, and intuitive navigation for an enjoyable and engaging user experience.



Improve your employees' job performance by educating them with learning that is tailored to your organization.



Use learning to boost employee engagement and ensure consistency across various departments.

Intelligent Learning.

Simplified.

Add isolved Learn & Grow and deliver a simple, yet robust learning system to your employees – anytime, anywhere. Human Resources, frontline supervisors, and team leaders can create and track online training, personalized for your business. Learning is self-paced and includes gamification elements to keep learners engaged.

With a visually intuitive interface, the isolved learning management system (LMS) makes learning more accessible to everyone on your team. You can also assign courses and paths to employees based on roles and individual needs, or assign a course to an entire team instantly.

isolved allows you to easily upload your own content to the LMS system or upload third-party course content in a compatible SCORM format. Provide user-friendly courses across your entire organization. Your employees can add courses and paths to their dashboard with a single click. Set up teams and assign coursework to everyone on a certain team. It's also easy to create a custom course for a specific team.

Create your own paths, quizzes, and certifications that meet the needs of your organization. Certificates will sync into iSolved for an easy view of course progression. You can also add tools to create personalized and custom content, which includes access to a library of 150 pre-built courses on topics, such as compliance, business skills, workplace safety, and management.

[LMS Short Video](#)

Take advantage of these benefits by adding **Learn & Grow features** to your platform!

Content marketplace

You can further expand your learning management system with the content marketplace, available with the isolved LMS. Within the content marketplace, you'll have access to a library of over 50,000 courses on a wide range of topics. Preview and find the courses that fit with the needs of your organization in the style and format you want. Many of the courses within this library are available in multiple languages and include written materials for visual learners.



Share & Perform

Boost the performance and engagement of your employees, simply and efficiently.

Transform your employees' experience with isolved Share & Perform and improve the culture and engagement at your organization. Encourage employees to track their performance and explore opportunities to engage and grow within the company by keeping the most important information in an easily accessible location on a personalized dashboard.

Increase engagement, improve performance.

A clear understanding of the progress employees are making toward goals and objectives fuels their engagement, productivity and wellbeing. isolved Share & Perform offers a library of courses so employees continue to grow personally and professionally – these courses are available in multiple languages and include written materials for visual learners. This helps reduce employee turnover and boosts the success of your organization.

Gallup's 2020 meta-analysis of 1.2 million workers across 49,495 work units shows that the most highly engaged teams have:



less absenteeism




greater profitability




better wellbeing

Performance.

-  **Conduct reviews from all angles** to better monitor and report on performance. Leverage flexible cycles that can be tailored to the needs of your organization using pre-loaded review templates. The 360 feedback tool enables you to collect feedback from peers, leaders and even customers for a comprehensive review.
-  **Set goals** for specific groups, individuals and the entire company. Create workstreams and attach them to goals, or cascade goals down the organization to track the progress from all team members.
-  **Identify star employees at a glance** with nine-box technology. It helps identify the potential of your employees – who has the most growth, who is demonstrating their potential, and who needs to improve – letting you focus on retaining the leaders and achievers of your organization.
-  **Access and maintain accurate job history records** for every employee.

Engagement.

-  **Reward and recognize** employees for their hard work and team effort. Using gamification to score points on a leaderboard, employees can nominate colleagues for awards to keep the team engaged and excited with the opportunity to win prizes as a result of their good work.

81%

In a Glassdoor Employee Appreciation Survey more than half of respondents said feeling appreciation from their manager would help them stay longer at their company and 81 percent said they're motivated to work harder when their employer shows appreciation for their work.



Share & Perform

(4 min. video)

Optimization Services

Embrace change. And together let's flourish.

Sure, organizational change is inevitable. Mergers and acquisitions, reorganizing and restructuring, and advances in technology bring their own challenges. Yet, managing change doesn't necessarily have to take a toll on your employees. In fact, recalibrating your workforce and processes to drive greater efficiency and effectiveness is quite achievable.

Close the
Gap Between



and Operate at a Level
of a Larger Team

A Collaborative Partnership

Centered around an engaging and supportive framework, isolved Optimization Services subject matter experts will help you extend the impact of your people strategy by closing the gap between your unique workforce challenges and your organizational knowledge and use of isolved People Cloud. They'll work closely with you to fully understand your situation and objectives, and use those insights to craft tailored solutions coupled with personalized training for getting the greatest value from isolved People Cloud.

Maximize Your isolved People Cloud Investment

Personalized services and tailored solutions spanning the entire employee lifecycle

- Onboarding, Accrual Plans, Pay Groups, Time, Benefit Plans and Enrollment
- Post-Implementation Changes/Training
- Manual-to-Automated Process Optimization
- Challenge/System Gap Assessment and Mapping
- Organization Goal Recalibration/Alignment
- System/Module Refresher Training
- Guidance and Best Practices to Maximize ROI



Paperless

Third Party
Sick Pay

HSA/HRA

Delivery
Address

Get a Jump on Year End

Spot Lighting: Group Term Life

Employees are subject to Social Security and Medicare tax on Employer Paid Life Insurance coverage over \$50,000.00.

Best practice: Contact Customer Support to have your isolved system setup to automatically calculate taxes each payroll and reflect on the employee's paystub. [isolved User Guide](#)

Group Term
Life

Personal Auto

401k Box 12D

Stock Options,
Gifts, Awards

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](#)

IMPORTANT DATES

Monday, June 19, 2023 – Juneteenth– Some Banks Closed
Tuesday, July 4, 2013 – 4th of July – Banks Closed

Best Practices

Reminder to Review W-2's and 1095's

- **Update Employees who have changed states , work in multiple states**
 - **Update Employees who have had life events**
 - **Don't forget to check New Hires and Terminations**

We value your feedback

Raffle 4 Stainless Steel Water Bottles and customers will get a \$15 gift card for completing all 3 reviews

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:

- [Software Reviews](#)
- [Trust Radius](#)
- [Gartner Peer Insights](#)



May Newsletter

- **Simplify Payroll with PayCard**: Provide one of the most comprehensive PayCard programs and eliminate paper within your payroll process.
- **Maximize Your isolved Investment**: Extend the impact of your people strategy by tapping into the new isolved Optimization Services Team!
- **Leverage HR Experts**: Learn how Mardek Enterprises (DBA Honey Baked Ham) tapped into the expertise of isolved's HR Services team to gain more time to focus on their employees.
- **Increase Peace of Mind**: Dane Johnston of SmartPay envisioned his HR department to be "accurate and compliant." His dream came to fruition with the help of isolved HR Services.
- **Compliance Confusion**: Understand new compliance laws around the country in a new Compliance Corner.
- **Avoid End of Year Rush**: Send in your GTL info for report to avoid the December rush!

Sign Up!

The screenshot shows the top portion of an email newsletter. At the top is the 'isolved' logo. Below it is the tagline 'A Helpful Newsletter Resource for the People of isolved People Cloud'. A black banner contains the text 'Monthly Newsletter - May 2023' and 'A MESSAGE FROM OUR CHIEF MARKETING OFFICER, LINA TONK: Hear why isolved is Where People Heroes Grow!'. The main content area features a video player with a play button. The video thumbnail shows a woman, Lina Tonk, with the text 'Where People Heroes Grow.' and a small character icon. Below the video is a call to action: 'Are you ready to grow? Become an isolved People Hero today.' with an image of a woman wearing a red superhero mask. At the bottom, a blue banner reads 'New Products & Resources'. Below this are two columns of content: '[Product Spotlight] Onboarding & Offboarding' and '[Marketplace Spotlight] Simplify Payroll with PayCard'. Each column has a short introductory paragraph.

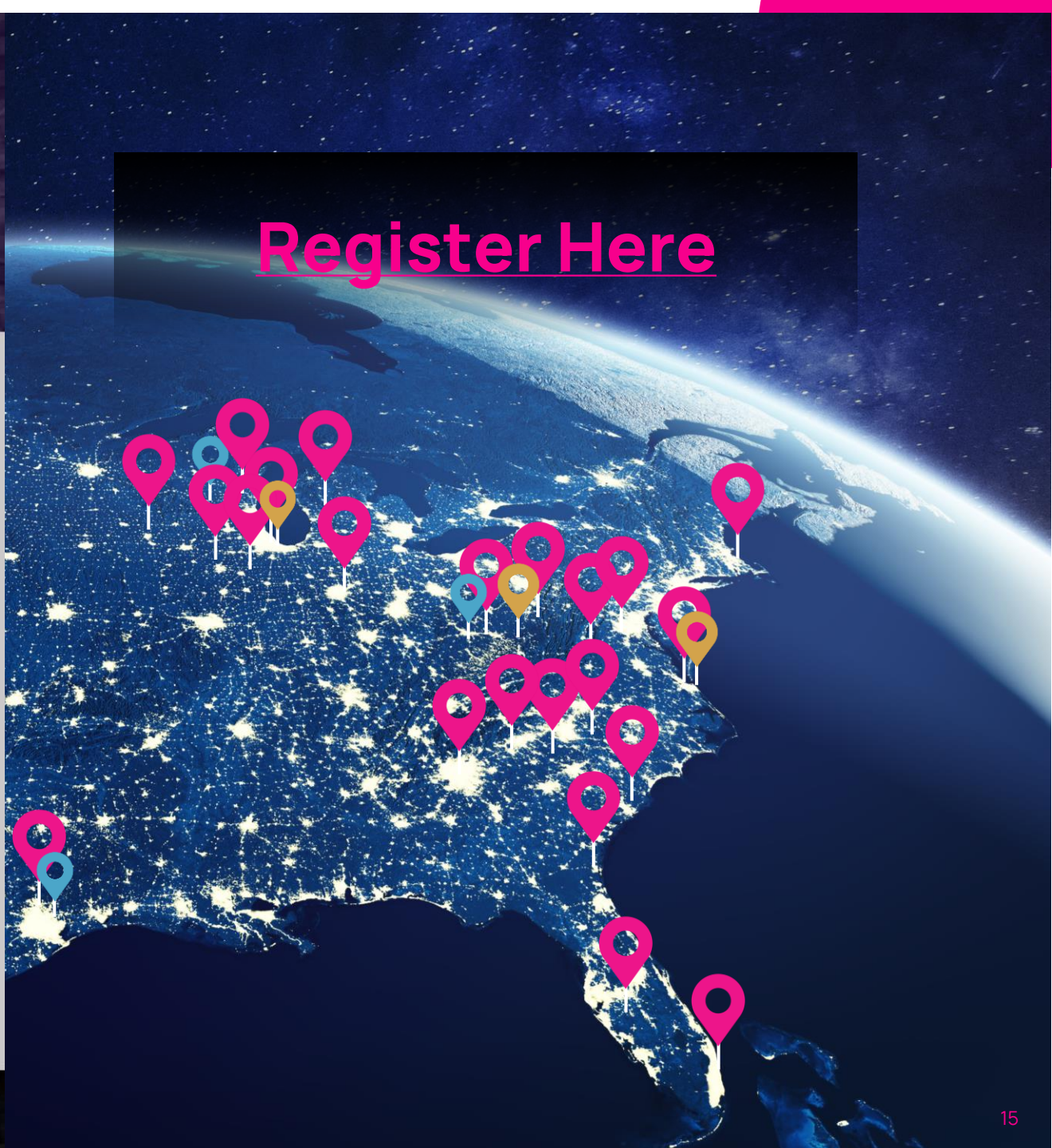


Save The Date!

Upcoming Roadshow Dates:

Jun 8	Salt Lake City, UT	Sept 14	Des Moines, IA
Jun 15	Newport Beach, CA	Sept 21	Phoenix, AZ
Jun 22	Indianapolis, IN	Sept 28	Las Vegas, NV
Jul 13	Columbus, OH	Oct 4	New York City, NY
Jul 20	Sacramento, CA	Oct 5	New Brunswick, NJ
Jul 27	Grand Junction, CO	Oct 24	Seattle, WA
Aug 3	Hartford, CT	Oct 26	Salt Lake City, UT
Aug 10	Chattanooga, TN	Nov 2	Dallas-Fort Worth, TX
Aug 16	Orlando, FL	Nov 8	Allentown, PA
Aug 23	Charlotte, NC	Nov 9	Philadelphia, PA
Aug 24	Columbia, SC	Nov 14	Madison, WI
Sept 7	Omaha, NE	Dec 6	Scottsdale, AZ
Sept 12	Schaumburg, IL		

We can't wait to see you!



[Register Here](#)

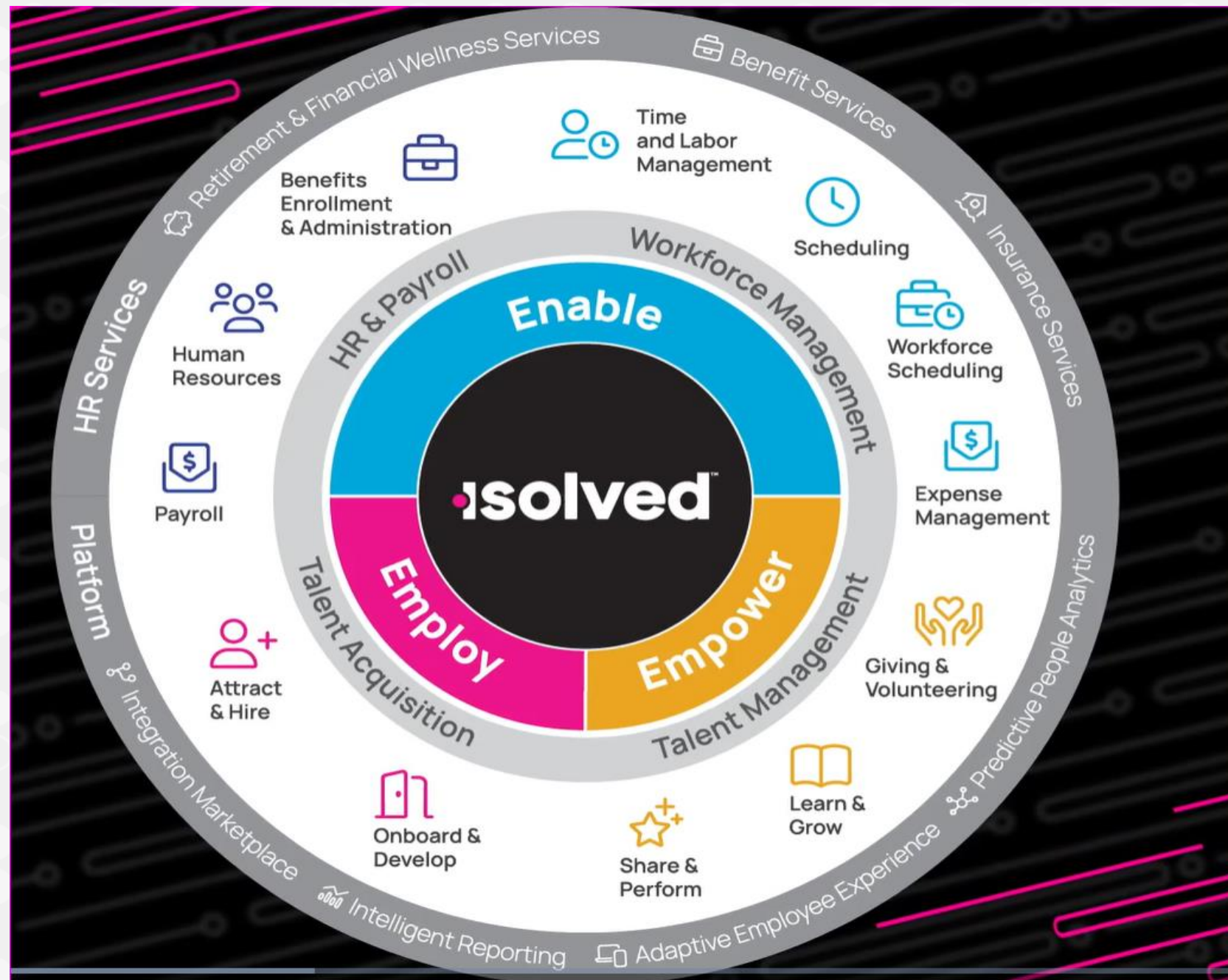
How can isolved help?

Learn more about what we do.

isolved



3-minute video





isolved™

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