

Sales and Marketing Guide

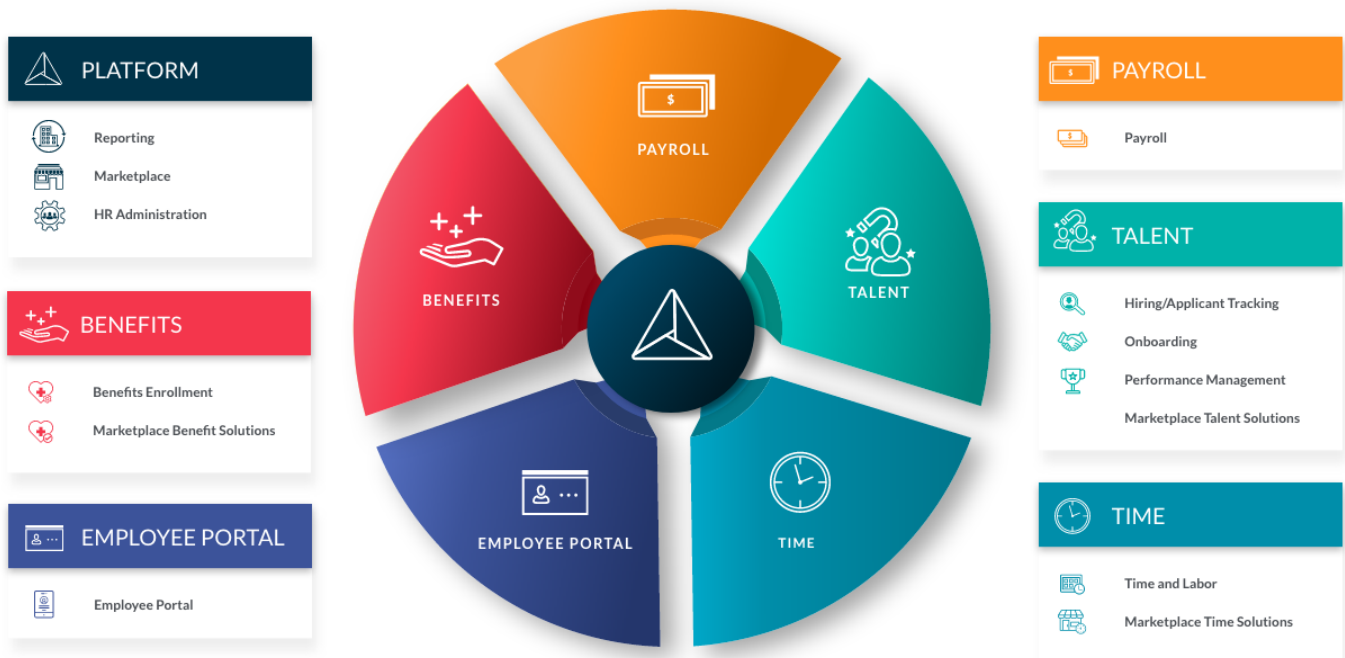


PRISMHR

What Do Your Clients Get? The PrismHR Platform

You provide your clients with powerful services, enabled by the PrismHR Platform. The PrismHR Platform is 100% web based, easy to use, complete HR software that couples with your expert HR services - all designed to simplify HR and let SMB leaders focus on running and growing their business.

It provides everything an SMB needs for world-class HR today, and tomorrow.

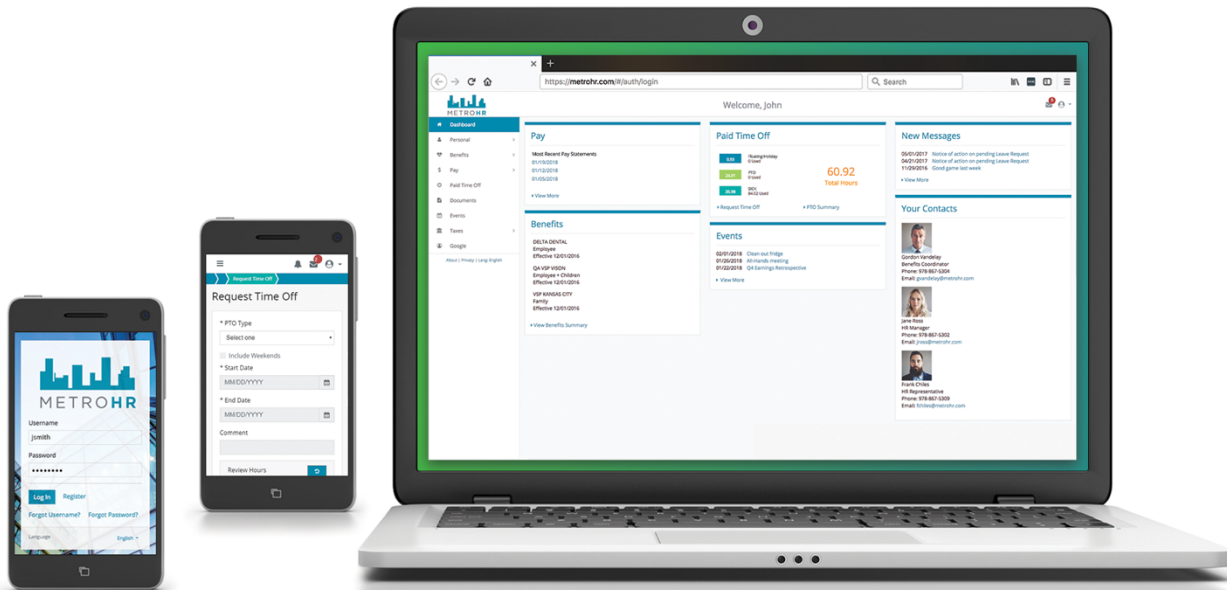


Later in this document, we will look more closely at the specific benefits and unique attributes of the PrismHR Platform.

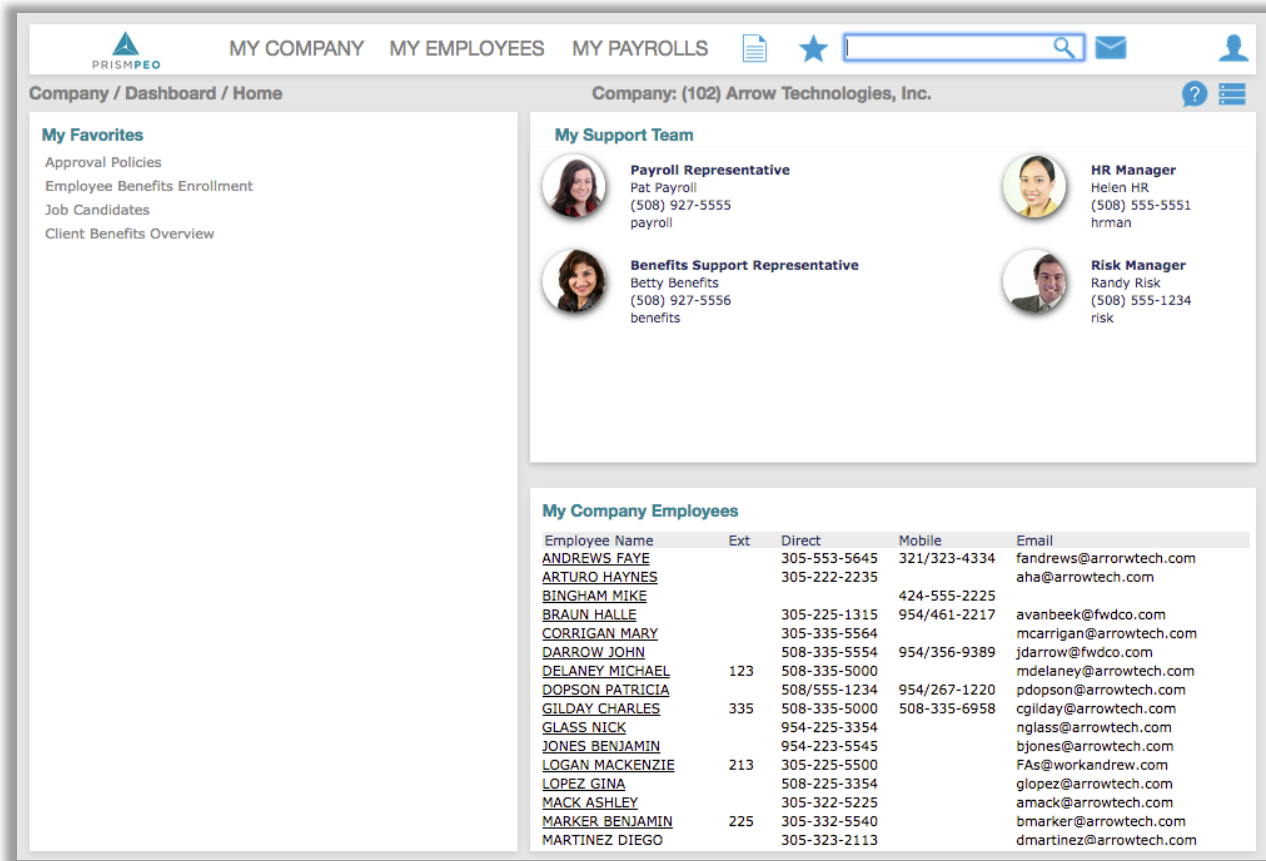
Introduction to the PrismHR Platform

The PrismHR Platform is a web-based solution to help **HR Service Providers, such as PEOs and ASOs** deliver world-class services to small and medium-sized businesses looking to outsource HR services. It helps enable your services and drives your efficiency, while providing your clients with a simple to use, easy to understand web-based interface.

Your clients will interact with a subset of the software in two ways. Their employees will use the Employee Portal that is optimized for smartphones, tablets and of course, desktops and laptops, to view HR data, get paystubs and more. The Employee Portal is easily customizable to represent the client's brand, including colors, log in screen and even customizable widgets. The system also supports Spanish, making it easier for their Spanish-speaking employees to navigate the portal and get the information they need.



Client managers login to a client-specific version of the PrismHR Platform to be able to view data on their employees, access reports, complete tasks, and even process payroll (if you are providing that service).



Company / Dashboard / Home Company: (102) Arrow Technologies, Inc.

My Favorites

- Approval Policies
- Employee Benefits Enrollment
- Job Candidates
- Client Benefits Overview

My Support Team

- Payroll Representative**
Pat Payroll
(508) 927-5555
payroll
- Benefits Support Representative**
Betty Benefits
(508) 927-5556
benefits
- HR Manager**
Helen HR
(508) 555-5551
hrman
- Risk Manager**
Randy Risk
(508) 555-1234
risk

My Company Employees

Employee Name	Ext	Direct	Mobile	Email
ANDREWS FAYE		305-553-5645	321/323-4334	fandrews@arrowtech.com
ARTURO HAYNES		305-222-2235		aha@arrowtech.com
BINGHAM MIKE			424-555-2225	
BRAUN HALLE		305-225-1315	954/461-2217	avanbeek@fwdco.com
CORRIGAN MARY		305-335-5564		mcarrigan@arrowtech.com
DARROW JOHN		508-335-5554	954/356-9389	jdarrow@fwdco.com
DELANEY MICHAEL	123	508-335-5000		mdelaney@arrowtech.com
DOPSON PATRICIA		508/555-1234	954/267-1220	pdopson@arrowtech.com
GILDAY CHARLES	335	508-335-5000	508-335-6958	cgilday@arrowtech.com
GLASS NICK		954-225-3354		nglass@arrowtech.com
JONES BENJAMIN		954-223-5545		bjones@arrowtech.com
LOGAN MACKENZIE	213	305-225-5500		FAs@workandrew.com
LOPEZ GINA		508-225-3354		glopez@arrowtech.com
MACK ASHLEY		305-322-5225		amack@arrowtech.com
MARKER BENJAMIN	225	305-332-5540		bmarker@arrowtech.com
MARTINEZ DIEGO		305-323-2113		dmartinez@arrowtech.com

So, What's the Story?

We will break down all the components of the PrismHR Platform later in this guide. But for now, let's get you started with you some of the high-level messages to share with your prospects and customers.

What is the PrismHR Platform?

It's cloud-based HR Software.

Who is the PrismHR Platform for?

It's built for small and medium-sized businesses that are looking to grow.

At a high level, what does the PrismHR Platform do for those small and medium-sized businesses?

The PrismHR Platform enables world-class payroll, benefits, HR, hiring and more, combined with services and advice from HR experts.

What's unique about the PrismHR Platform vs other software for SMB-focused HR?

The PrismHR Platform gives your clients a major advantage over organizations that aren't using it.

1. The PrismHR Platform delivers a complete solution for HR not just a point product. The PrismHR Platform

covers the entire spectrum of HR (hire to retire); and gives your clients the flexibility to grow with you and add new services when needed so they can get the capabilities they need today, and tomorrow.

2. SMB leaders are empowered with knowledge and insight. Your clients now have the power to understand their human resources better than ever. From reporting to payroll and benefits, they now have one system to do everything they need for HR. In addition, because the system is integrated, your client's data isn't cordoned off. They can now understand HR and their people in ways never before possible.
3. The PrismHR Platform enables HRO experts to take on HR responsibilities and services better than any other technology. Ultimately, the difference isn't just with the technology, but the combination the technology and your services bring together. No other technology makes this possible at this scale.

The PrismHR Platform is unique for your clients because it gives them:

- A complete solution for HR, not just a point product.
- Knowledge and insight, along with the power to do more.
- A way to work with HR experts that isn't possible with other approaches.

Wow, that is a lot. How does this benefit those small and medium businesses?

- It reduces complexity. Navigating the sea of choice and process for HR systems is daunting, and choosing anything but the PrismHR Platform, means that the SMB won't be able to get the full range of integrated HR services across the employee lifecycle. Choosing the right combination of technology and services for both today and beyond will help your clients and their organizations grow more rapidly.
- They can move and grow faster. By combining a cloud to grow with the right services from your PEO, your clients will save countless hours every week on HR functions and instead, can focus on customers and growth. The combination of technology and your services gives your clients the flexibility they need today and tomorrow, all to help drive their growth.
- They can save money and retain great employees. With great HR technology and your PEO services, your clients can reduce employee turnover. Reducing client turnover is one of the greatest challenges for SMBs.

Explaining the PrismHR Platform to Prospects

Now that you've seen the high-level story, remember to keep it simple. You don't have to explain all of this to your prospect. In fact, you probably shouldn't in most cases. Here's what we recommend:

1. Keep it very simple and focus on the combination of technology and services to help the company grow today and tomorrow.
2. While you need to be able to explain the software at a high level to prospects, it's important to focus initial efforts on your prospects' larger level business challenges. Share how the combination of services and technology from your PEO will help them address those challenges.
3. Tell the prospect they get flexible, easy-to-use software that's 100% browser based, enabling their employees and you access from anywhere at any time. It's built to give them the capabilities they need

today and tomorrow.

What About Communicating the PrismHR Brand?

Many prospects will not be familiar with the PrismHR brand - they will be more concerned with your company's brand. You can brand platform modules as your own. e.g.; [company name] Payroll or use the Powered by PrismHR branding found in the [SEEDS portal](#). To help you communicate that the technology your PEO provides is trusted and proven, you can tell your prospect that this software:

- Is currently used by more than 80,000 other small and medium-sized businesses.
- Provides HR for more than 2 Million worksite employees.
- Handles more than \$80 Billion in payroll annually.

Understanding the Products in the Platform

Infrastructure

The PrismHR platform infrastructure is hosted in a private, secure cloud. Your PEO's data is private too - it's never intermingled with data from other PEOs, so you can rest easy, knowing your most valuable asset, your customer's payroll, benefits and HR data, is safe and secure.

The system is designed to scale and grow with you, so as you add more worksite employees, you never need to worry about adding servers or people – and your clients never have to worry about that either. The PrismHR Platform and our team handle that for you. Additionally, the platform delivers built-in disaster recovery. If something happens in one data center, you and your clients can be up and running as quickly as possible. While most of your clients may not be concerned about any of that, when needed, these can be valuable selling points.

Platform

The platform delivers all the capabilities your clients and you need for Human Capital Management, including: Payroll, Benefits, along with Human Resources Outsourcing, from Back Office functions like Billing and Receivables, to Employer and HR Administration. Self Service provides client managers and worksite employees with access to data and tasks, from a browser, anywhere, anytime. You can also add Onboarding and Benefits Enrollment to streamline new hires as well as make benefits and open enrollment a breeze. And Data Bridge helps you transmit your data to insurance carriers.

The Web Services APIs makes it easy customize and integrate PrismHR with your systems and partners. Or, use prebuilt integrations from the PrismHR Marketplace and leading partners for time and attendance, hiring and much more. The platform provides a core layer of business intelligence, from prebuilt, filterable reports to rich ad-hoc reporting, making it easy to understand what's going on with your overall business, as well as share and provide insight with your clients.

The PrismHR system is 100% web based and delivered in the cloud - not only for your team, but also for your

client managers and worksite employees. Everyone can access the system from anywhere, anytime, across all devices.

This section provides details on the products that comprise the PrismHR platform. Please note that:

1. Your company may not currently use all these products. Be sure to check with your team about what you currently have. Please note, if you don't offer the complete solution, one of your competitors does.
2. Not all products are relevant to your clients. You may still want to understand them at a high level, but if it's not relevant to your buyer, don't bog them down with details they don't need.

Payroll

What it does: PrismHR Payroll gives you and your clients complete payroll functionality. You can empower your clients to run their own payroll, automate common tasks, view status, reports and much more.

How it helps your clients: Always efficient and reliable, PrismHR Payroll saves you and your clients more time and gives you both more flexibility and accuracy than alternatives. It brings previously out of reach world-class payroll to small and medium sized businesses.

Benefits Administration and ACA Compliance

What it does: You get the flexibility to customize benefit programs to the unique requirements of each of your clients, dramatically reducing paperwork, and increasing compliance. Plus, with calculations and reporting that specifically address Affordable Care Act requirements, you and your clients get the business intelligence you need for constantly changing healthcare regulations.

How it helps your clients: Benefits continue to become more complex. Your clients need flexibility to stay competitive, and compliance to reduce their risk. No one likes paperwork, and PrismHR Benefits Administration dramatically reduces paperwork and overhead. In addition, if you offer PrismHR Benefits Administration, your clients get the accuracy they need and the ability to adjust their benefits over time. And with Affordable Care Act reporting, both you and your clients get the insight and assurance that you are in compliance.

Hiring

What it does: Clients can easily post jobs to the internet as well as leading job boards and social networks, including: Indeed, Simply Hired, LinkedIn, CareerBuilder, Craigslist, Twitter and Facebook. Prospective employees can apply to jobs online and you can automate and facilitate the interview and hiring process. Data from placed candidates automatically converts to a new hire record, streamlining onboarding, payroll and benefits.

How it helps your clients: Reduce the time it takes to hire a candidate by 30% or more with online job posting. By spreading the word to all the places that candidates are looking for a job, you can find the best possible employees. Extend your brand to your candidates and make their hiring and onboarding process a breeze.

Onboarding

What it does: Easily capture employee demographic information, federal, state and local tax filing forms, and client-specific forms. With a welcome-aboard message center, company policy/handbook acknowledgement and electronic signature functionality, new hires can get started fast and your client gets complete, accurate

records and data.

How it helps your clients: New employees have an easy to use online tool to get started quickly and get setup for payroll and more. As a business owner or leader, you get to collect all the data you need to bring your new hire on board, and that data will make its way into payroll and other applications.

Benefits Enrollment

What it does: Provides new hires and employees with a web-based, easy to use way to sign up for benefits at the start of their employment or during open enrollment. Your PEO can help clients streamline the employee benefits enrollment process with customized workflow and tracking. Manage high volume, complex enrollments with fewer resources compared to other systems.

How it helps your clients: Your clients can make it easy for their new employees to get access to benefits quickly, without the overhead a frustration of countless paper forms.

Performance Management

What it does: Provides clients with a web-based system that they can use to establish a formal performance management program. They can track employee and manager reviews, set team and individual contributor goals, and solicit employee feedback.

How it helps your clients: Your clients have a quick and easy way to collect and track performance information for every employee. This helps them identify and reward strong performers (and thus increase retention) as well as poor performers who could use training and development to improve productivity.

Employee Portal

What it does: With Employee Portal, your clients' employees get easy access to HR data and tasks, anywhere, anytime, and from any device. The Employee Portal experience is built with a mobile-first approach, responding and adapting to any device. With the Employee Portal Manager experience, your client managers get access to reports, and can act on timecards and time off requests. Plus, with customizable security, individuals only have access to what they should see - and nothing they shouldn't.

How it helps your clients: With easy access from anywhere, and a clean, modern user experience, your clients' employees can find and use the HR and payroll information they need when they need it. Your client managers can get access to their own user experience and view reports to gain insight, perform tasks, or even run a payroll.

Time and Labor

What it does: Time and Labor makes it easy for your customers to track time and attendance of their employees. Employees can clock in and out with their mobile device, webclock, or variety of physical clock options. Additionally, Time and Labor is integrated with Payroll, which greatly improves efficiency and reduces potential errors associated with manual timesheet entry.

How it helps your clients: With Time and Labor, your clients get better visibility of one of their greatest expenses,

labor. And with clear visibility into their employees' time, they can better control their labor costs.

Reporting

What it does: With pre-built reports for payroll, HR and benefits both your team and your clients can rapidly filter and view data by date, client or a wide range of other parameters. And you can build and setup ad-hoc reports for your clients, so they can go deep and view any data they need, how they want to see it. And with a highly flexible security model, you can create reports that only the individuals you specific can see the data they need.

How it helps your clients: Your team and client managers can now analyze, understand and act on data to run their business, better than ever before.

Marketplace

What it does: The PrismHR Marketplace features pre-built integrations with leading solutions from our partners. It includes time and attendance, performance management, credential checks, employee banking, emergency credit and more. By using the Marketplace, your PEO can offer your clients additional functionality to help run and grow their business.

How it helps your clients: By choosing your PEO, and the PrismHR platform, your clients get the flexibility they want for the future. If there is something they need that's not immediately available in the PrismHR platform, there may already be a pre-built partner solution for them.

HR Administration

What it does: PrismHR makes it easy to track and manage worksite employee activity. From training and development, OSHA, Worker's Compensation, to other HR compliance activities and events, you and your clients have everything you need for complete, accurate insight into employee activity.

How it helps your clients: HR Administration helps by tracking key activities and compliance, so when needed, your clients can understand their employees better and reduce their risk.

Additional Modules:

The following modules are also available with the PrismHR Platform, but are mostly used by and for PEOs, so your clients won't experience them in their work with the PrismHR Platform. They are described below for your reference and are not something we recommend discussing with your clients.

Financial Operations: PrismHR Financial Operations provides accounts receivable and billing, check reconciliation, accounting control and integration with leading general ledger systems.

Data Bridge: Automatically extract, transform, validate and securely transfer enrollment data to provider-specific systems. Additional file type support coming soon.

API: The Application Programming Interface (API) gives developers the ability to write code to connect the PrismHR Platform to other systems.

Beating the Competition

There are two classes of competitors that we'll look at here:

- PEOs that don't use PrismHR technology.
- SMBs that want to do it themselves without your help

HR Service Providers that don't use PrismHR

If you are selling against a PEO that does not use PrismHR, you should be able to establish differentiation and technology advantage around the following areas:

- Employee Portal experience – Most other PEO software solutions do not have an easy to use, mobile optimized self-service experience that compares to PrismHR.
- Product depth and flexibility – no other PEO technology offers as rich a set of capabilities for both today and tomorrow, and the flexibility you will want and need.
- Proven platform – no other PEO technology powers so many businesses and worksite employees or delivers as much payroll accurately and on time as the PrismHR Platform.

SMBs that want to do it themselves without your help

If you engage with a prospect that says they want to manage HR, payroll and benefits themselves, the best way to win their business is to showcase the value and benefits of your services, combined with the PrismHR Platform technology.

Whether your prospect wants to use spreadsheets and a few software solutions or try to cobble together software and the necessary services for an attempt at a complete HR offering they will have to spend a significant amount of time evaluating and using software, tracking information, ensuring compliance and more. As we all know, HR is extremely complex and if you are running a small company, all the nuances and required knowledge of HR can be overwhelming. Lastly, the do-it-yourself approach won't scale as the company grows and adds more employees, along with wanting to expand your benefits options.

Let's look more closely at this. When a company gets started, the first thing they need is payroll. The owner usually evaluates a few solutions and then starts using payroll software. From there, they may realize they need some sort of time tracking solution. So again, the owner evaluates a solution, chooses one and starts using it. That process extends at each step of growth, adding in benefits, HR tracking, hiring and more. Each time, the owner looks for a point solution to solve his or her immediate challenge.

So what does that mean?

1. They are spending valuable time and resources away from the reason they initially started their company.
2. Point solutions almost definitely do not connect with each other, and that means that the ability to understand data and gain insight across all the different HR technology is virtually impossible.
3. If they want to change systems for one of their areas, it could disrupt their entire fragile apple cart of systems and data.
4. And forget about getting true strategic HR advice. Without a holistic system that can provide insight

across all the necessary HR touchpoints that a true strategic professional can leverage, they are almost definitely just going to get point advice on one topic.

Clearly, this approach is shortsighted and will hamper company efficiency and growth.

Next Steps and Additional Resources

The PrismHR SEEDS portal contains resources to help you market and sell. This includes customizable templates, demos, training and discussion with the PrismHR marketing team and SEEDS community.

- If you aren't currently a member of the seeds program, apply to join here: PrismHR.com/SEEDS
- If you are already a member of the SEEDS program, visit the portal at seeds.prismhr.com to get access to additional materials to help you market and sell. Sign up for upcoming training or view a recording, download or watch a demo, and ask questions and provide feedback to the PrismHR team and the SEEDS community.

If you have any questions about the SEEDS program, please feel free to contact us at SEEDS@prismhr.com.