



Asure's **Go To Market** Strategy

2024 Asure Reseller Partner Conference

Presented by Pat Goepel, Chairman and CEO of Asure





Eyal Goldstein

President and Chief Revenue Officer, Asure

Welcome to Evolve!

Outline

- Going Wide – Shift to bundles
- Our GTM approach:
- Product areas of focus





Going Wide | The Shift to Bundles

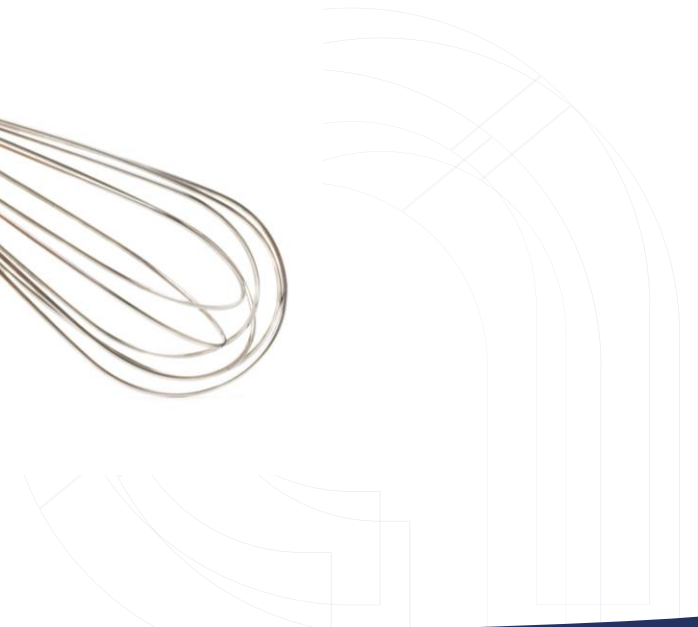
Why Bundle?

It's how we already buy...



Why Bundle?

Small business owners know their craft. They don't know ALL of the ingredients to HR success...



Why Bundle?

No one is selling just payroll...



ADP What We Offer Who We Serve Why ADP Resources About

Small Business Payroll Overview Payroll Packages Switching to ADP Payroll for One

Get a quote 888-501-3230 [Get Pricing](#) [Launch Self-Guided Demo](#)

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For startups and established companies that just need basic payroll done right.
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Enhanced Payroll
For basic payroll plus ZipRecruiter®, State Unemployment Insurance and background checks.
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Complete Payroll & HR Plus
For everything included in our Enhanced package, plus basic HR support.
[Get pricing →](#)

HR Pro Payroll & HR
For everything included in our Complete package plus enhanced HR support and perks for you and your employees.
[Get pricing →](#)

Payroll & Tax

	Essential	Enhanced	Complete	HR Pro
Payroll: Computer, Mobile App, Phone Call	✓	✓	✓	✓
Direct Deposit	✓	✓	✓	✓
Robust Reporting	✓	✓	✓	✓
General Ledger Interface	✓	✓	✓	✓
New Hire Reporting	✓	✓	✓	✓
W-2s and 1099s	✓	✓	✓	✓
Tax Filing	✓	✓	✓	✓
Payroll Delivery	✓	✓	✓	✓
Multi-company Management	✓	✓	✓	✓
Multi-jurisdiction Payroll	✓	✓	✓	✓
Wisely® Direct Debit Card	✓	✓	✓	✓
Check Signing: Security	✓	✓	✓	✓
State Unemployment Insurance (SUI) Management	✓	✓	✓	✓
Job Costing	✓	✓	✓	✓
Labor Law Poster Compliance	✓	✓	✓	✓

Human Resources

	Essential	Enhanced	Complete	HR Pro
ADP® Employee Access	✓	✓	✓	✓
New Hire Onboarding	✓	✓	✓	✓

PAYCHEX Our Solutions Resources Our Company Professional Partnerships Contact Us

Paychex Flex® Bundle Options That Fit the Needs of Any Size Business

Select Pro Enterprise

Price: Customized Based on Your Unique Needs Price: Customized Based on Your Specific Needs Price: Customized Based on Your Specific Needs

[Get a Quote](#) [Get a Quote](#) [Get a Quote](#)

Payroll & Financial Support

	Select	Pro	Enterprise
Direct Deposit, Pay Cards & On-Site Check Printing	✓	✓	✓
Taxpay® Payroll Tax Administration with W-2/1099	✓	✓	✓
Additional Pay Options	✓	✓	✓
Garnishment Payment Service	Add-on	✓	✓
General Ledger Service	Add-on	✓	✓

Employee Experience

	Select	Pro	Enterprise
Employee Self-Service and Mobile Experience	✓	✓	✓
Financial Wellness and Cashflow Assistance	✓	✓	✓
Learning Management System*	✓	✓	✓
Paycheck Preview™ and Approval	Add-on	Add-on	✓

Talent Management

	Select	Pro	Enterprise
Employee Onboarding	✓	✓	✓
HR Library	✓	✓	✓
Employee Handbook Builder	—	✓	✓
Pre-Employment Screening	Add-on	✓	✓
Performance Management	Add-on	Add-on	✓

gusto Why Gusto Products Solutions Accountants Resources Pricing

Sign up for better payroll and HR with a limited-time offer of 25% off the Plus plan. [Create account](#)

[See demo](#) [How it works](#) [Create account](#) [Sign in](#)

Simple
A streamlined set of automatic payroll features and benefits integrations.
\$40/mo
plus \$6/mo per person
[Find your plan](#)

Plus
LIMITED TIME OFFER
Comprehensive payroll, benefits, and HR tools to help employers build a great place to work—in-person or remote.
~~\$80~~ **\$60/mo**
plus \$12 \$9/mo per person
[Find your plan](#)

Premium
Scalable payroll and benefits, expert HR, priority support, and a dedicated success liaison to meet the complex needs of growing teams.
Exclusive pricing
Contact us for details
[Talk to sales](#)

Plan details:

- Full-service single-state payroll including W-2s and 1099s
- Full support
- Employee profiles and self-service
- Basic hiring and onboarding tools
- Gusto-brokered health insurance administration
- Employee financial benefits
- Payroll and time-off reports
- Custom admin permissions
- Integrations for accounting, time tracking, expense management, and more

Save 25% for the first 3 months. Create an account by Aug 2, 2024 and run payroll by Aug 30, 2024 to apply this discount.

Plan details:

- Everything in the Simple plan, plus:
- Full-service multi-state payroll including W-2s and 1099s
- Next-day direct deposit
- Advanced hiring and onboarding tools
- PTO management and policies
- Time tracking and project tracking
- Time Kiosk
- Workforce costing and reports
- Team management tools
- Performance reviews
- Employee surveys and insights

Add-ons on the Plus plan

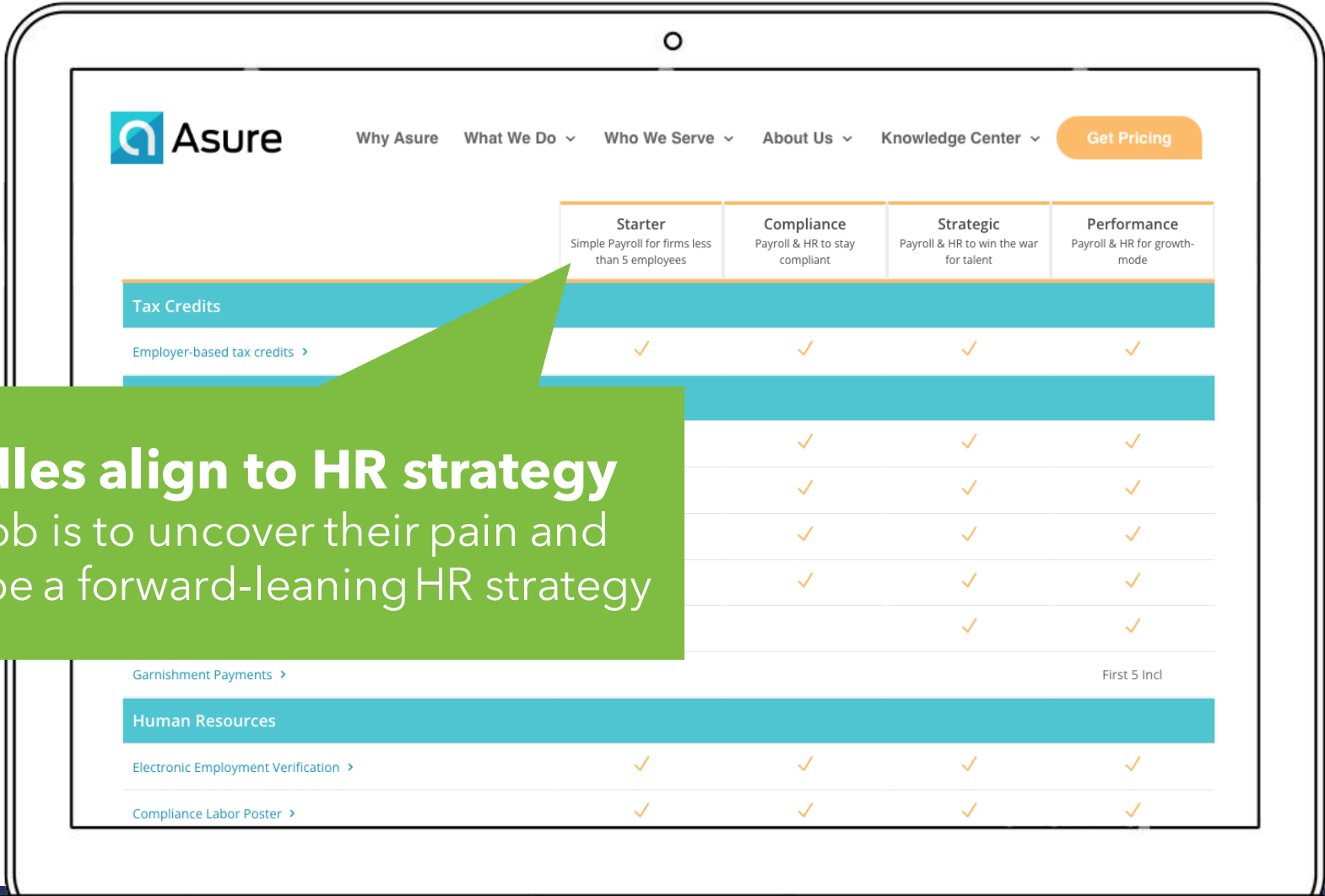
- Priority support and HR resources ~~\$8~~ **\$6/mo per person**

Plan details:

- Everything in the Plus plan, plus:
- Dedicated Customer Success Manager
- HR Resource Center
- Compliance alerts
- Access to certified HR experts
- Full-service payroll migration and account setup
- Health insurance broker integration
- R&D tax credit discount
- Waived fees and exclusive pricing
- Priority support

Asure's Bundle Principles

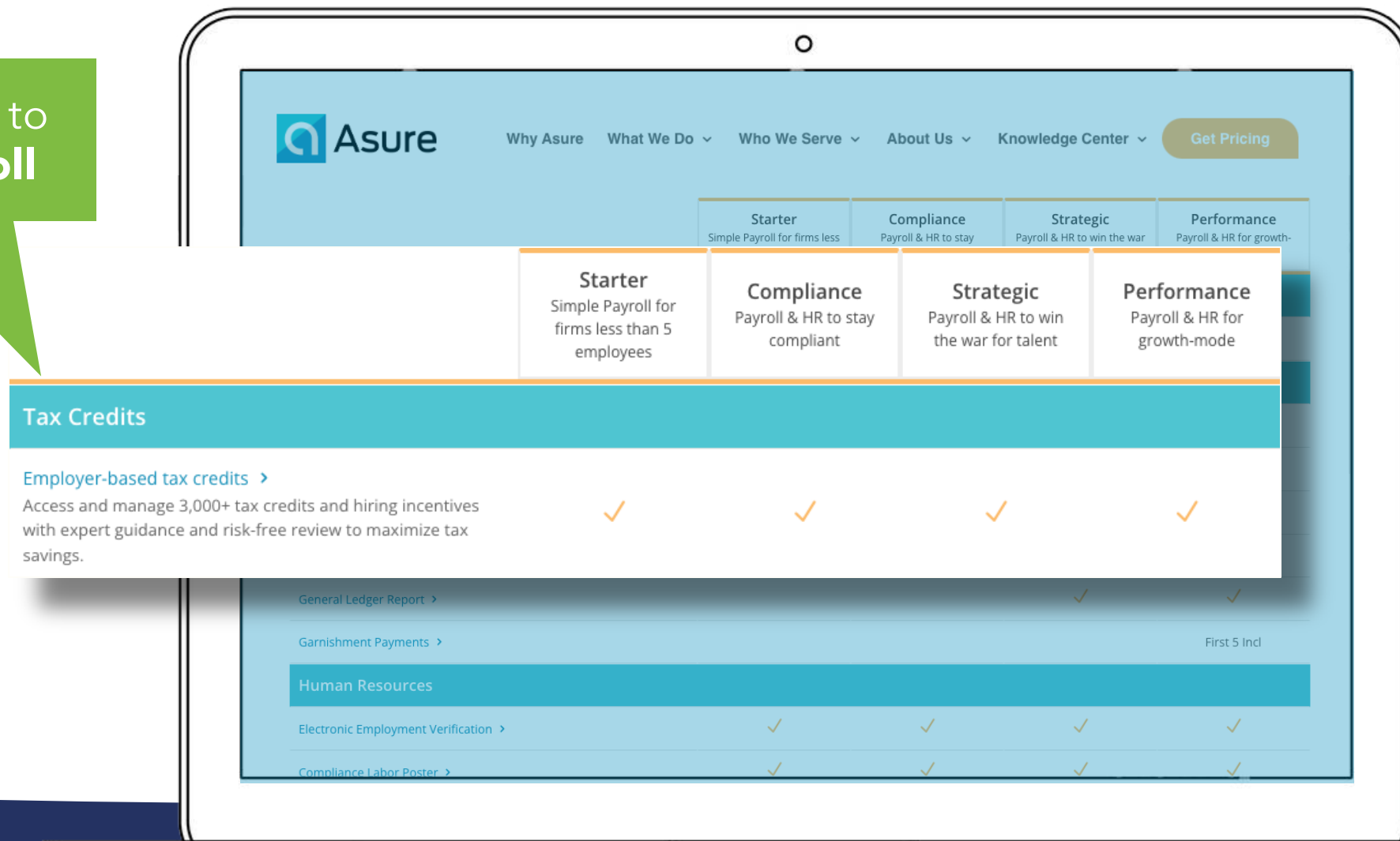
Bundles align to HR strategy
 Our job is to uncover their pain and prescribe a forward-leaning HR strategy



	Starter Simple Payroll for firms less than 5 employees	Compliance Payroll & HR to stay compliant	Strategic Payroll & HR to win the war for talent	Performance Payroll & HR for growth-mode
Tax Credits				
Employer-based tax credits >	✓	✓	✓	✓
Garnishment Payments >				
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
			✓	✓
			✓	✓
Human Resources				
Electronic Employment Verification >	✓	✓	✓	✓
Compliance Labor Poster >	✓	✓	✓	✓

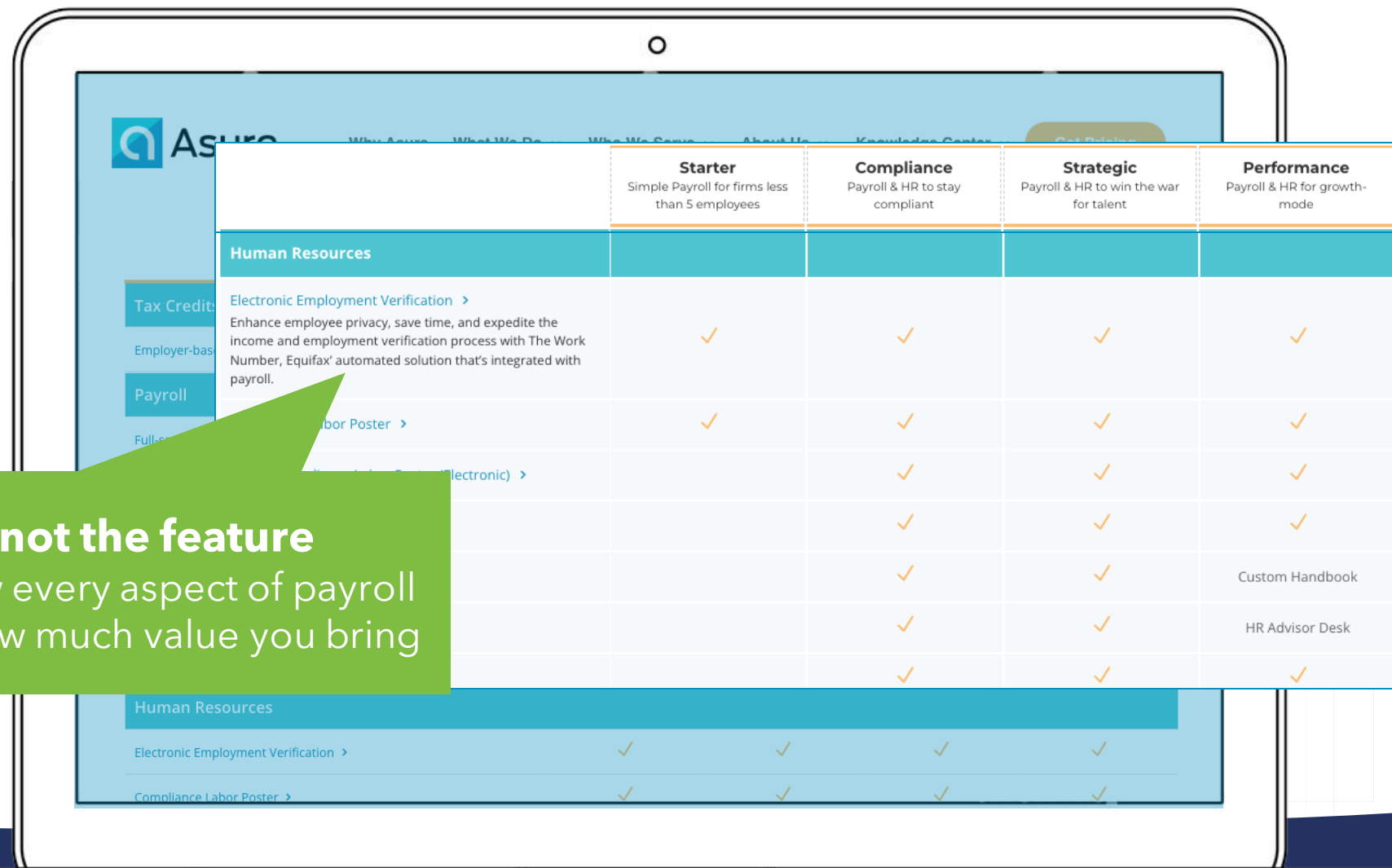
Asure's Bundle Principles

Begin with Access to Capital, **not payroll**



	Starter Simple Payroll for firms less than 5 employees	Compliance Payroll & HR to stay compliant	Strategic Payroll & HR to win the war for talent	Performance Payroll & HR for growth-mode
Tax Credits				
Employer-based tax credits > Access and manage 3,000+ tax credits and hiring incentives with expert guidance and risk-free review to maximize tax savings.	✓	✓	✓	✓
General Ledger Report >			✓	✓
Garnishment Payments >				First 5 Incl
Human Resources				
Electronic Employment Verification >	✓	✓	✓	✓
Compliance Labor Poster >	✓	✓	✓	✓

Asure's Bundle Principles



	Starter Simple Payroll for firms less than 5 employees	Compliance Payroll & HR to stay compliant	Strategic Payroll & HR to win the war for talent	Performance Payroll & HR for growth-mode
Human Resources				
Electronic Employment Verification > Enhance employee privacy, save time, and expedite the income and employment verification process with The Work Number, Equifax' automated solution that's integrated with payroll.	✓	✓	✓	✓
Compliance Labor Poster > Full-service labor poster service	✓	✓	✓	✓
Electronic (electronic) > Electronic signature and document management		✓	✓	✓
		✓	✓	✓
		✓	✓	Custom Handbook
		✓	✓	HR Advisor Desk
		✓	✓	✓
Human Resources				
Electronic Employment Verification >	✓	✓	✓	✓
Compliance Labor Poster >	✓	✓	✓	✓

Sell the value, not the feature
 Your clients don't know every aspect of payroll and HR, Teach them how much value you bring

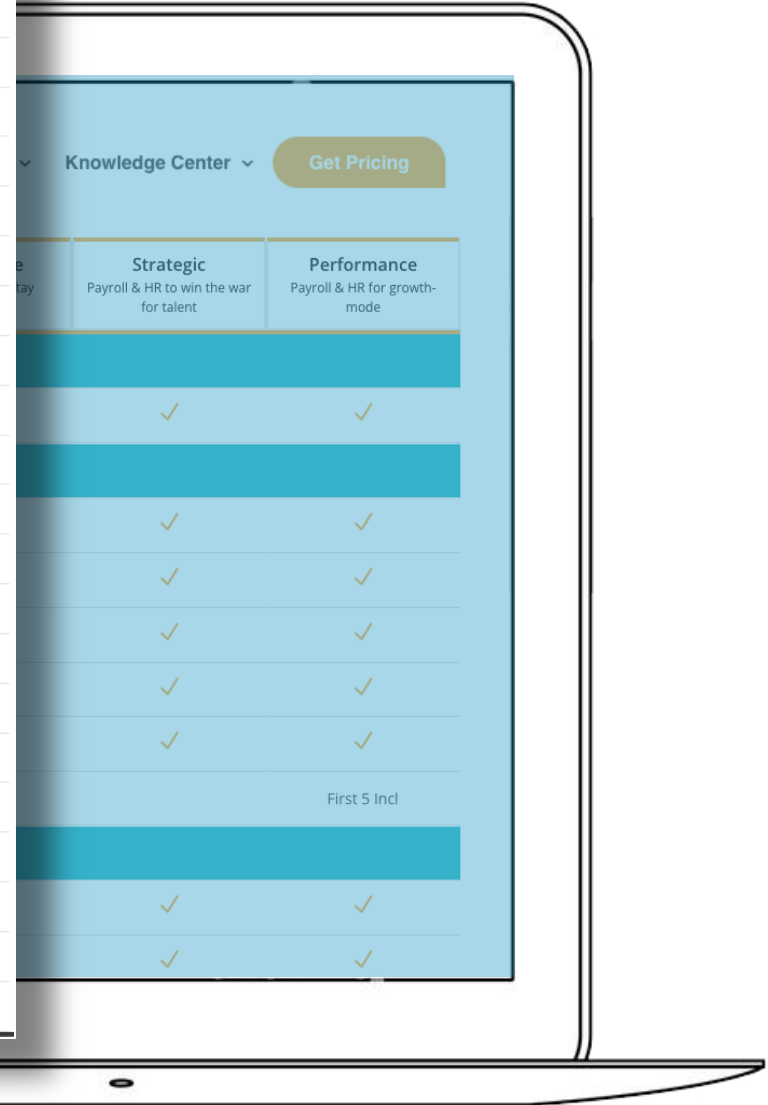
Asure's Bundle Principles

	Starter Simple Payroll for firms less than 5 employees	Compliance Payroll & HR to stay compliant	Strategic Payroll & HR to win the war for talent	Performance Payroll & HR for growth-mode
Human Resources				
Electronic Employment Verification >	✓	✓	✓	✓
Compliance Labor Poster >	✓	✓	✓	✓
Virtual Compliance Labor Poster (Electronic) >		✓	✓	✓
HR Online Library >		✓	✓	✓
Handbook Builder >		✓	✓	Custom Handbook
HR Hotline (phone & email) >		✓	✓	HR Advisor Desk
HR Compliance updates >		✓	✓	✓
Federal and state HR forms >		✓	✓	✓
Salary benchmarking >		✓	✓	✓
HR Assessment >		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
Benefits Tracking >			✓	✓
Performance Management >			✓	✓
Custom Handbook (English or Spanish) >				✓
HR Advisor Desk >				✓

Differentiate with HR
 Break HR software and services into discrete components to create unique offerings

Biggest differences in bundles is HR

	Starter Simple Payroll for firms less than 5 employees	Compliance Payroll & HR to stay compliant	Strategic Payroll & HR to win the war for talent	Performance Payroll & HR for growth-mode
Human Resources				
Electronic Employment Verification >	✓	✓	✓	✓
Compliance Labor Poster >	✓	✓	✓	✓
Virtual Compliance Labor Poster (Electronic) >		✓	✓	✓
HR Online Library >		✓	✓	✓
Handbook Builder >		✓	✓	Custom Handbook
HR Hotline (phone & email) >		✓	✓	HR Advisor Desk
HR Compliance updates >		✓	✓	✓
Federal and state HR forms >		✓	✓	✓
Salary benchmarking >		✓	✓	✓
ment >		✓	✓	✓
		✓	✓	✓
		✓	✓	✓
Onboarding >		✓	✓	✓
storage, routing, and e-acknowledgment >		✓	✓	✓
eSignature >		✓	✓	✓
racking >			✓	✓
racking >			✓	✓
Performance Management >			✓	✓
Custom Handbook (English or Spanish) >				✓
HR Advisor Desk >				✓
Learning Management System >				✓





Asure's Go-to-Market

Spoiler Alert: Don't lead with Payroll

We live in a post-pandemic world

and there's no such thing as going "back to normal"



Access to Capital

Inflation, volatility, and monetary policy have reduced bank's risk tolerance



Staying Compliant

Explosion of new Federal, State, and Local HR laws is impossible to keep up with



Managing Talent

Labor shortage is making it harder and more expensive to manage workforce

Why Access to Capital?

A large red circle containing the text '71%' in a bold, red, sans-serif font. The background of the slide is a blurred image of a computer keyboard with a green plant in the foreground.

71%

A majority of owners rely on personal savings (71%) and credit cards (67%) as the top sources for funding their small businesses.

- US Chamber of Commerce

Why Compliance?

Time Spent on Compliance¹

“Compared to six months ago, has the time or resources you spend completing licensing, compliance or other government requirements increased?”



Leave Laws



Pay Transparency



Fair Chance Laws

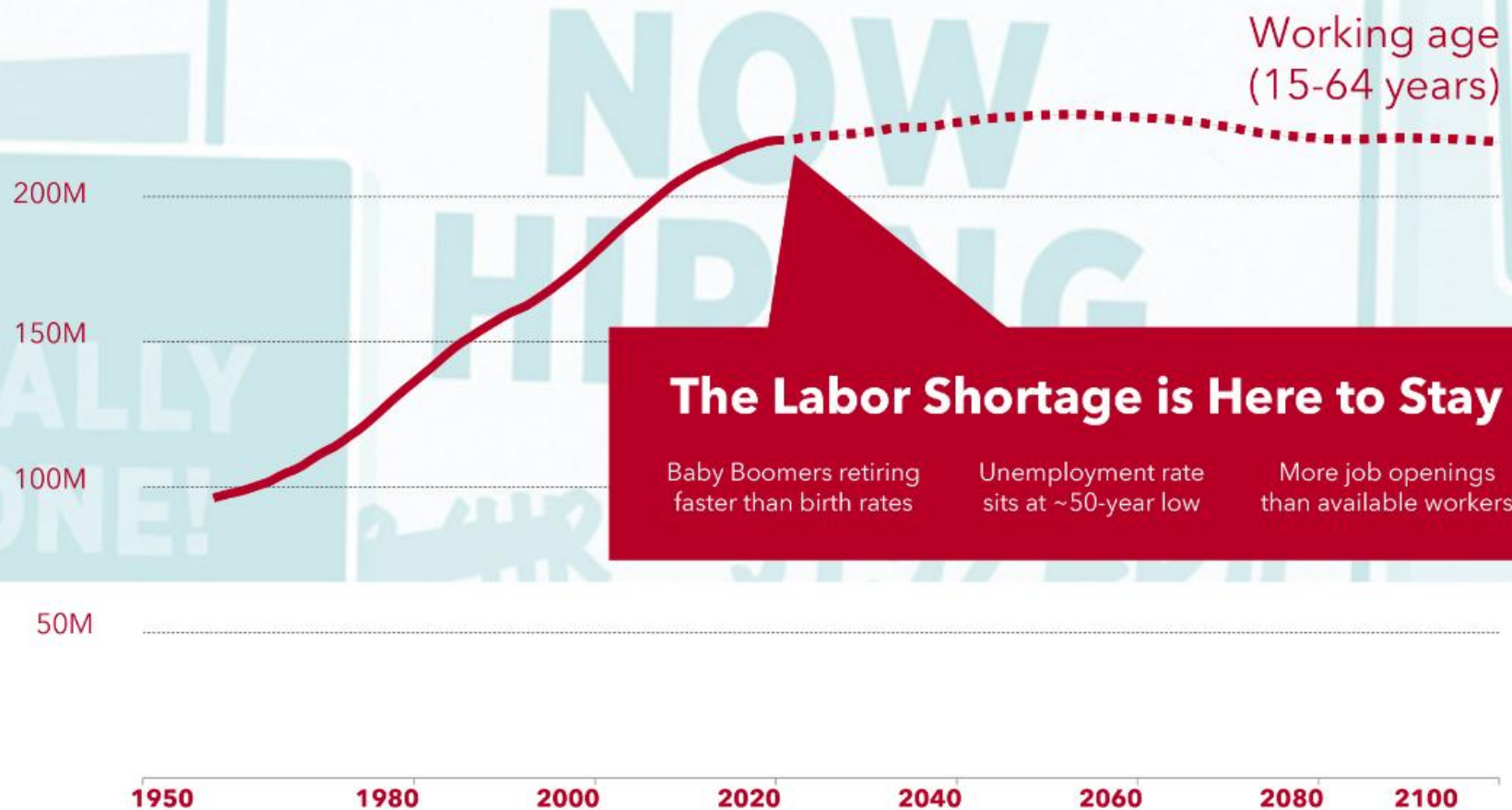


Salary History Bans

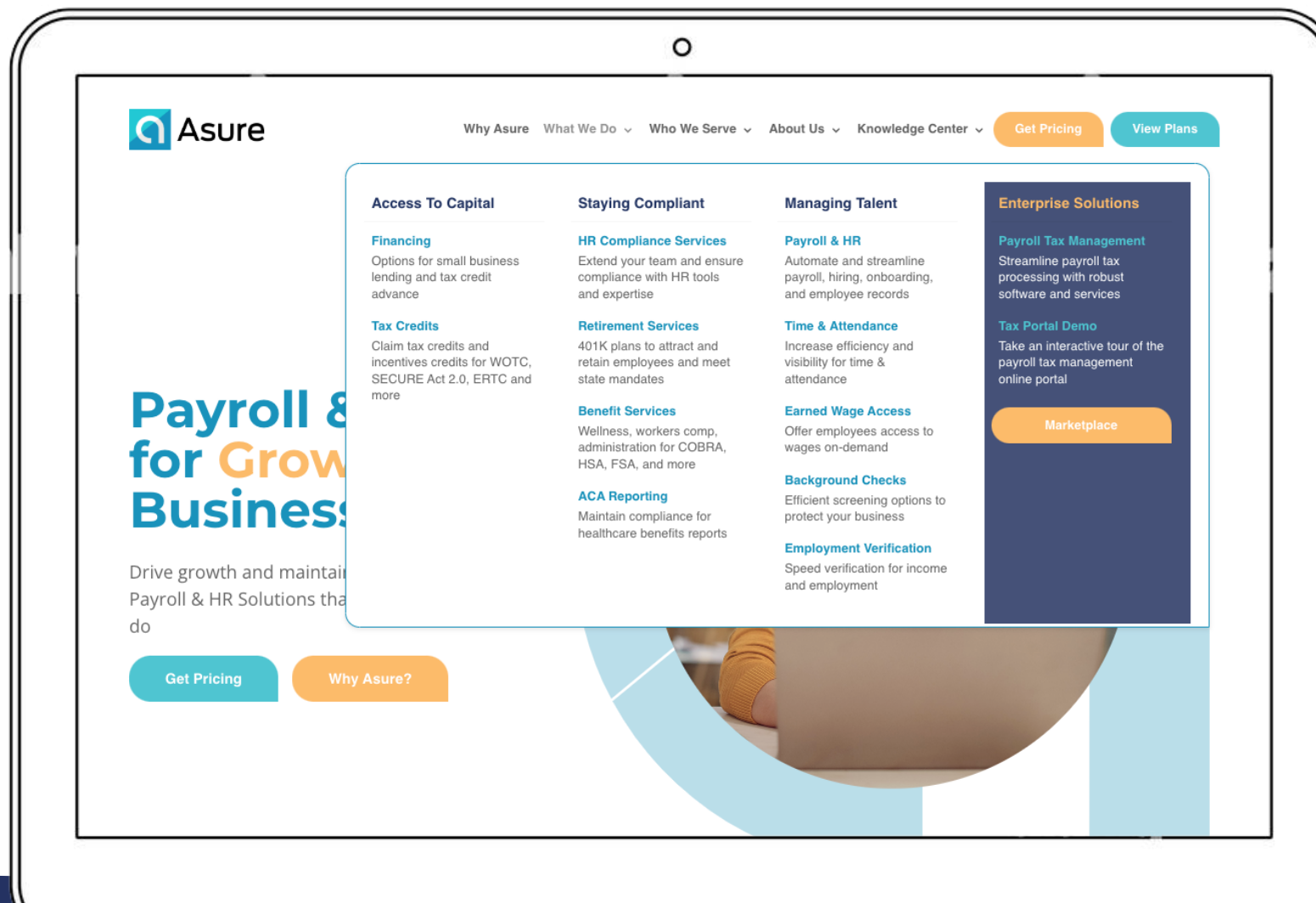


Marijuana Laws

Why Talent (vs. Payroll & HR)?



GTM = Messaging & Product Positioning





Product Areas of Focus



Secure Act 2.0

Good for Employees

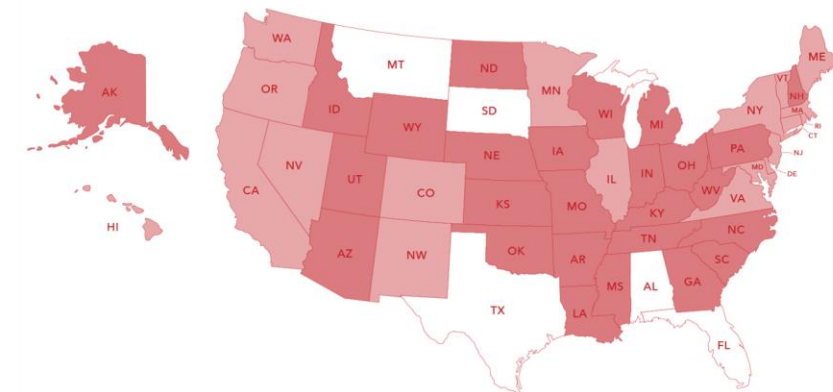
- Increased min. distribution age
- Larger catch-up contributions
- Long-term, part-time employees
- Saver's matching from gov't
- Student loan matching

Good for Employers

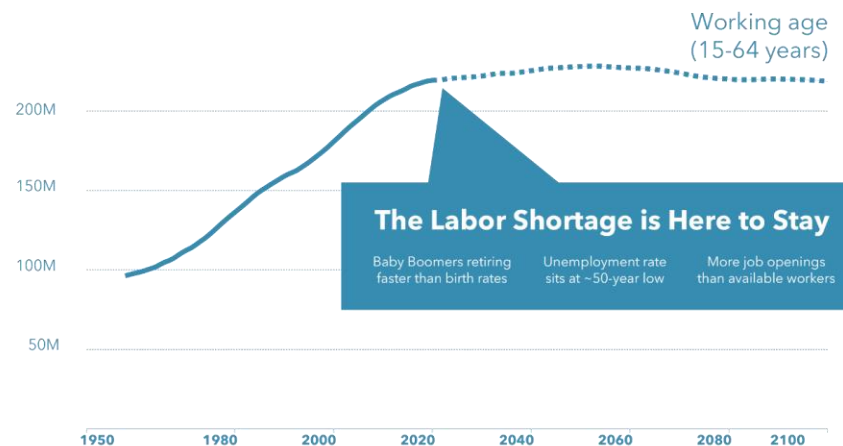
- Recruit and retain talent
- Tax credits up to 100% of start-up and admin cost for first 3 years
- Tax credits up to \$5,000
 - Greater of \$500, or
 - \$250 per eligible employee

Asure 401(k)

State Mandates

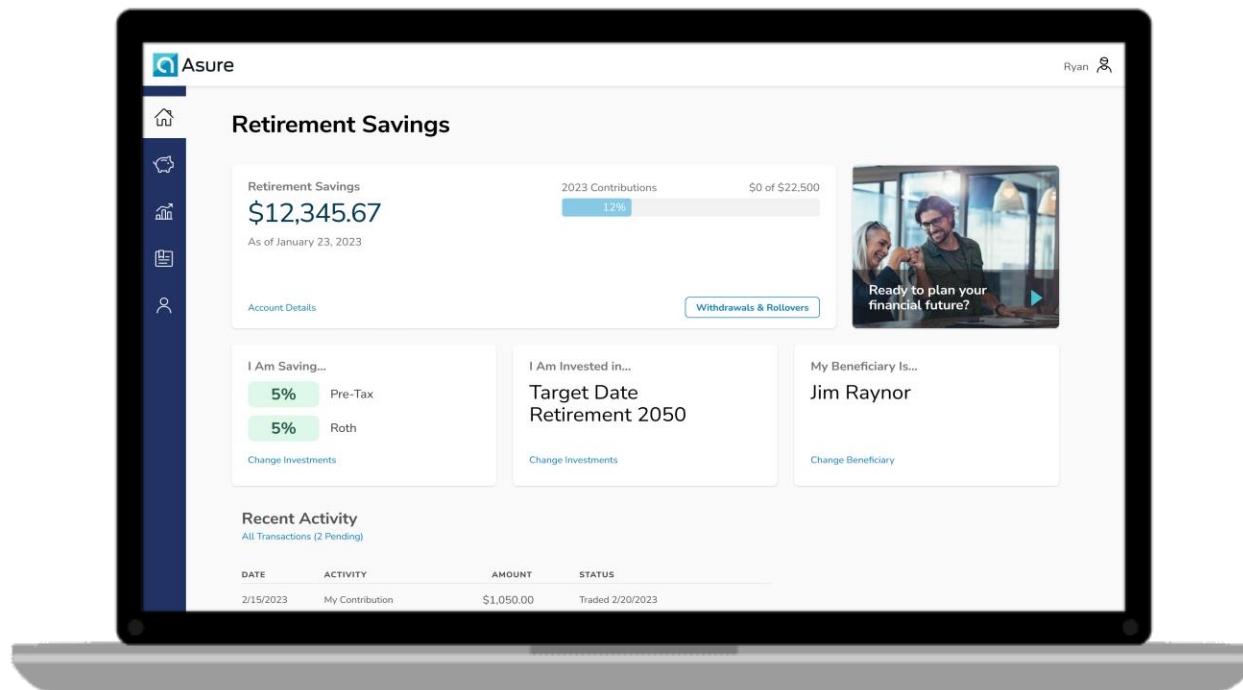


War for Talent



Asure 401(k) | Reseller Revenue Share

- Recurring Revenue = 20%
- One-time revenue = 10%



*Example 20 employee company

	Annual	Rev-Share	Profit
Setup			
Year #1	\$1,000	10%	\$100
Year #2	\$1,000	10%	\$100
Year #3	\$1,000	10%	\$100
	\$3,000		

Recordkeeping			
Year #1	\$1,860	20%	\$372
Year #2	\$1,860	20%	\$372
Year #3	\$1,860	20%	\$372
Year #4	\$1,860	20%	\$372
Year #5+	\$1,860	20%	\$372

Proactive Health Insurance

Section 125 Pre-Tax Benefits

The PHMP

(Proactive Health Management Plan)



Family Telemedicine



Behavioral Health



Diet and Nutrition



Disease Management



Health Risk Assessment



Biometric Screening



Immunizations



Health Coaching



Online Knowledgebase



DNA Screening



Hospital Daily Indemnity

Proactive Health Insurance Savings for Employees and Employers

Employee Savings

(Example employee w/\$60K Salary)

	Before	After	Difference
Regular Pay	\$5,000	\$5,000	\$0
Sec 125 PHMP Deduction	\$0	(\$755) PHMP Plan Cost	(\$755)
Taxable Income	\$5,000	\$4,245	(\$755)
Federal, State and Fica TAX	(\$1,326) [‡]	(\$1,065) [‡]	\$261
Indemnity Claim	\$0	\$625** Indemnity Claim Payment	\$625
Net Paycheck	\$3,674	\$3,805	\$131
		Monthly Increase in Spendable Income	\$131
		Annual Increase in Spendable Income	\$1,572

Employer Savings

(Reduced FICA per employee)

	Before	After	Difference
Employee's Taxable Income	\$5,000	\$4,245	(\$755)
Company's Monthly FICA Tax Obligation	\$383	\$325	(\$58)
Company's Annual FICA Tax Obligation	\$4,596	\$3,900	(\$696)
		Monthly Company Savings	\$58
		Annual Company Savings	\$696
		Annual Company Fee	\$372
		Net Annual Company Savings	\$324



Unlike other WOTC providers, HRlogics dives deeper and **looks for other tax credit opportunities, based on the location, growth, and operations.** Their team of credit experts will **scan for 3,000 state & federal credits, incentives and grants.**

- Investment Tax Credits
- Property Tax Abatements
- Veteran Hiring Tax Credits
- Film Production Tax Credits
- Quality Jobs Tax Credits
- Workforce Development
- Incumbent Worker Training
- Headquarters Tax Credits
- Sales & Use Tax Credits
- Payroll Tax Rebates
- Utility Rate Reductions
- High Wage Job Creation
- Infrastructure Resources
- Environmental Tax Credits
- State R&D Credits
- Expedited Permits
- Land Grants
- Training Grants

Payroll Tax Management

Payroll Tax Management (PTM)

HCM firms and complex, multi-state enterprises manage all aspects of payroll tax filing





Thank You!

2024 Asure Reseller Partner Conference



Agenda

- Rewind to Evolve 2023
- 2024 Roadmap
- API Strategy
- Artificial Intelligence

