EVOLVE
An HCM Growth Summit

Understanding & Leveraging AsureHR

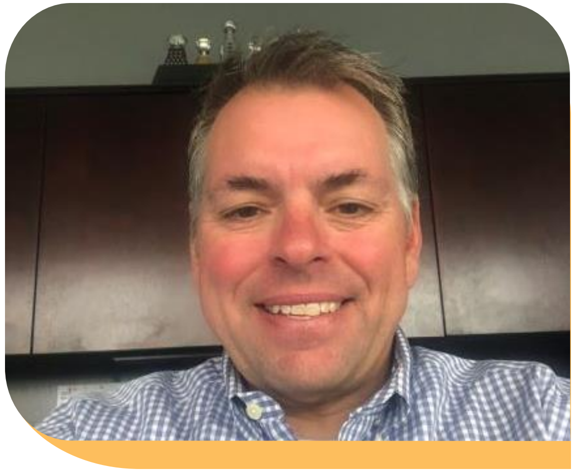
2023 Asure Reseller Partner Conference

Asure

Speakers Introduction

Laura Greer

AsureHR - Client Success Partner



Paul Trahan

VP - Asure Implementations

Session Agenda

01 Latest Releases & Looking Forward

02 Demo

03 Deployment

04 General Use Best Practices

05 Integrations

06 Q&A

Latest Releases

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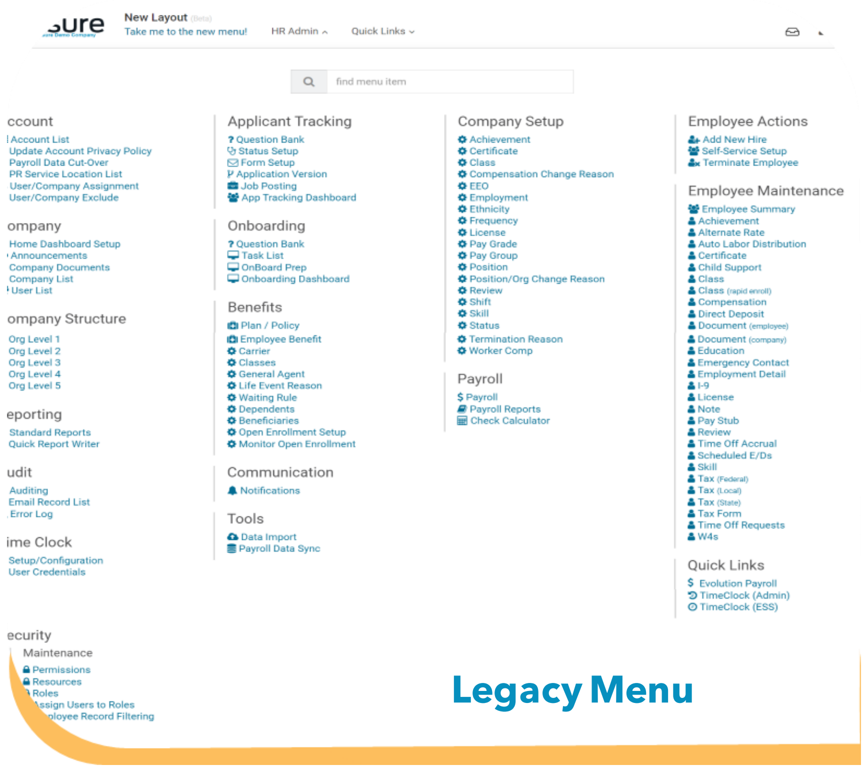
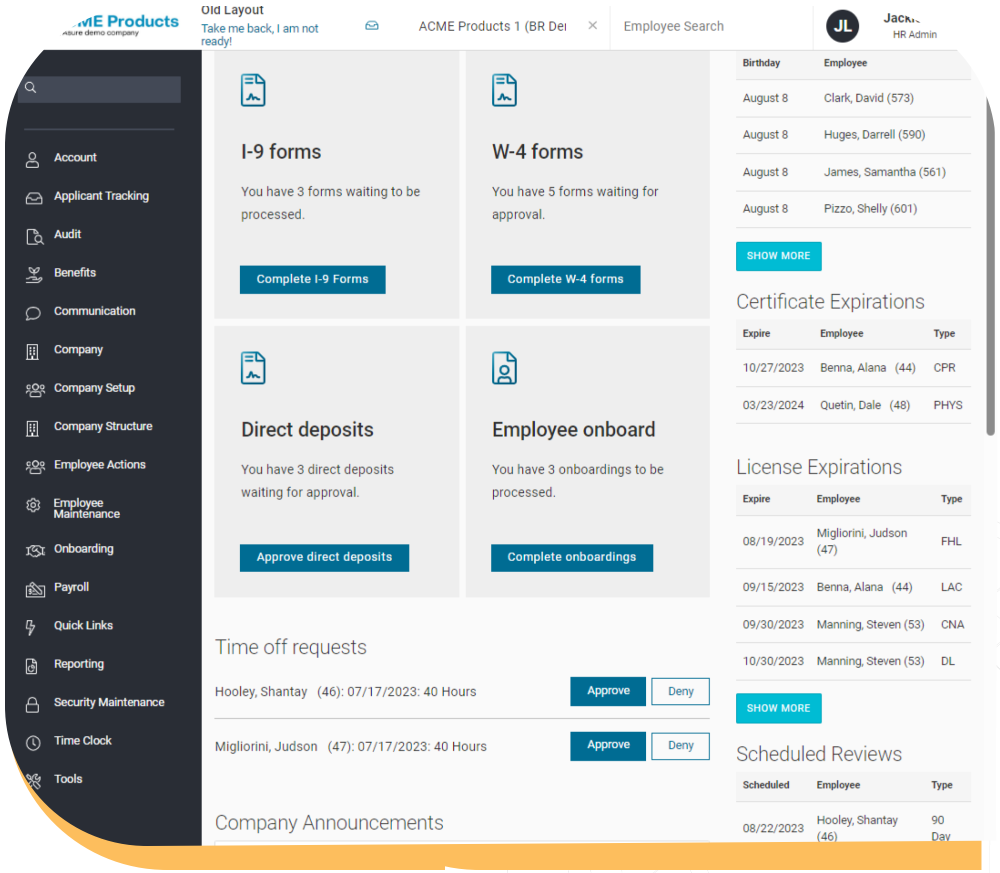
New Mega Menu



Legacy Menu

- Fly-down menus which covered the dashboard
- Basic listing of screens, grouped and bundled by detail level



- Consistent look and feel to AsurePR product family with a simplified Menu
- Provides simultaneous display of menu options and Dashboard

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Latest Release!

Electronic Onboarding with required e-sign documents:

- E-sign documents that are generated but not completed during onboarding, will now also be displayed with Pending status in the document component for Admin
- When an admin attempts to approve an onboarding process with e-sign documents, all e-sign documents are systematically reviewed to confirm "Signed" status. When validation completes, a warning message now displays to alert the admin of unsigned documents. Admin is then allowed to return to the onboarding dashboard to reset the status of the onboarding or continue to approve the onboarding

Improvements!

- AsureTime Users: Before concluding the approval process for Onboarding an employee, a Pop-up now presents reminding users of the importance of the TLM fields and their accuracy. Users may now select **Cancel** for the opportunity to go back and confirm applied settings or **Continue** to complete the process.
- Organizations with pre-existing DBDT Structure: DBDT Name assignments can now be updated and/or unhidden as needed via AsureHR

Upcoming Roadmap

Reporting

- Monthly Admin E-Sign document count for billing purposes

Mass Updates

- Pay Rates & alternate Rates

Expanded Import Abilities

- Onboarding and New Employees

New Import Module

- Positions
- Supervisors
- Benefits

Give it your best Demo

Prepare a Successful Demo

- **Know your prospect**
  - Understand your prospects current needs and be prepared for potential needs: It not just about knowing what they do need, it's also important to validate what they don't
- **Prepare a Demo Client & Sample Users**
  - Build a Demo Client… or 2… or 3. They're free! Be prepared to show the bells and whistles, and how easy the process might be.
  - Present from their perspective and what their typical day will look like
  - The AsureHR application is designed to engage various roles: The HR Admin, the Payroll Manager, the Employee, the New Hire
- **Define your workflow**
  - Onboarding to Payroll: help the prospective client see the easy flow of information from start to finish
  - Add a New Hire and Welcome them to the organization
  - Prepare for payroll with any maintenance and/or needed Approvals
  - Team effort vs one-man show: The day-to-day maintenance can be shared amongst team members, and provide important compliance validations along the way or it's just as easy for PR/HR Manager
- **Be the client**
  - Present from their POV

Deployment

Successful Implementation

- **Understand what an HRIS provides**
  - Familiarize with HR Functions, terminology and compliance needs
- **Know the capabilities and understand the solution**
  - Simple yet scalable and expansive HCM to accommodate the growing needs and wants of employers
  - Difference between AsureHR Essentials and Advanced
- **Know your client**
  - Thorough discovery with your client about who they are, their current needs, and potential future expansion will help you to prepare a proper project plan
  - Are they looking for Onboarding, Applicant Tracking, Document Sharing & Storage, e-Signatures on vital documents, integrations
  - Do they know how they can benefit from the various AsureHR offerings and data integrations?
- **Plan ahead**
  - Utilize template(s) settings when creating new client/company with necessities predefined
  - Follow provided guidance regarding required details and setting applications to ensure flawless cutover
  - Determine which details and modules you and your client will benefit from the greatest first - #1 option is Electronic Onboarding
- **Engage your client in the project**
  - Ask your client to get involved while learning the system along the way: Documents, communications, etc. (Hint: This is a great way to get in some hands-on training with your client)

Effective Training

- ## Know your audience
  - Familiarize with the users and the roles of those you will be training.
  - What processes and features will they need to know?
  - What will they need to be aware of to be able to train to others, like their employees?
- ## Define the workflow
  - Navigation is key: Show and provide definition to the key features of the application when they first log in (Hint: Have you accessed the new Product Tour yet?
  - Be consistent, with the common features: Using the Dashboard, what they currently have access to and any additional items they may potentially utilize to further streamline their HR workflows
  - Present something familiar: their own information and where they can maintain their Company details such Positions, Position/Org Change Reasons, Comp Change Reasons, etc
  - Employee maintenance is a must: what can you maintain and how do you do that?
  - Based on the client's elected modules, priorities and potential timelines, what do they need to know to start using today?
  - Where can they find other custom details and items they should know for tomorrow – Invite them to explore
  - Reports: Housed vs Quick Report Writer
  - Review Employee Views so they are prepared for potential employee questions
  - Payroll – judge your audience
- ## Help them get their hands dirty
  - Invite them to bring new hire paperwork with them to use during the process, as well as various employee maintenance items

Best Practices

What you should know

General Best Practices

- Use the default security roles ease administration:
  - Base Employees,
  - Base Managers,
  - Base Admins, and
  - Base Anonymous.
  - The four default roles SHOULD not be deleted, renamed or altered
  - Carefully clone, reconfigure, rename and assign to customize to the clients needs.
  - Always document role configurations, noting revision dates!

- Encourage following Compliance procedures from the start
  - Take advantage of recorded and stored e-signed documents
  - Maintain true dates for DOB, DOH, and DOT with effective dates which impact so many variables such as ACA, EEO and State Reporting

Capitalize on Integrations

Expand your offerings with Integrations

JazzHR

Seamless Recruitment and Job Postings

PayKonnect

Automated 401K Integrations

AsureTime

Common UI and smoother workflows

Employee Navigator

Employee to Carrier Benefits Integration

AsureMarketPlace

Current and Future Integrations

Q & A

Resources & Contact

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General Support support@asuresoftware.com or

Additional Training hcmtraining@asuresoftware.com

Support.asuresoftware.com

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Thank You!

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