



GROW

Goals, Results, and Opportunities Workshop

WORKSHOP GUIDE

Use this guide to better understand client's GOALS, quantify their RESULTS, and identifying OPPORTUNITIES to help them GROW



How to use this guide

This discovery document is a strategic sales tool designed to facilitate consultative conversations during **the F-Engaged** phase where the prospect is “engaged” to learn more about our solutions. Ideally, the outcome of this discovery will result in an **E-Qualified** opportunity where the buyer agrees we can help them and has committed to a formal evaluation of our services.

Small business owners are busy and will only give you time relative to the value they think you’ll bring. If you ask insightful questions and suggest best practices that no competitor does, you’ll earn the right to ask for more time and further differentiate Asure with your consultative approach.

The guide provides three levels of questions to better understand their businesses strategy, pain points, and the tasks involved with their employee lifecycle processes.

	SECTION I Business Strategy	SECTION II Employee Lifecycle	SECTION III Employee Admin
Minimum Questions	Designed for quick interactions when you’re unable to secure more time with business owner (15-30 mins)		
Essential Insights	Questions to uncover the high probability pain points associated with employee lifecycle processes (~1 hour)		
Benchmark Growth*		For clients willing to invest time and see value from consultative approach to growing their business (1+meetings)	

*PRO TIP

Share the 2024 HR Benchmark Report with your client to follow along as you benchmark their HR best practices compared to America’s fastest growing companies.

asuresoftware.com/2024-hr-benchmark-report



How to use this guide

3-Step Conversation Flow

Follow this process whether the prospect has given you 15-minutes or multiple hour-long discovery sessions. The only difference is how many questions you can ask given the time allowed.

SECTION I

Business Strategy

(Goals – Results = Opportunity)

1. Understand their **Goals**
2. Quantify current **Results**
3. **Opportunities** are the missing ingredients or things holding them back from achieving their goals

SECTION II

Employee Lifecycle

Ask questions to mine for pain in each phase of employee lifecycle:

1. Identify pain-points
 2. Quantify pain-points
 3. Explore impact of pain-points
- Recruiting & Hiring
 - Benefits
 - Onboarding
 - Development
 - Compliance
 - Retention
 - Performance
 - Post-Employment

SECTION III

Employee Administration

Ask questions to mine for pain associated with managing payroll:

1. Identify pain-points
2. Quantify pain-points
3. Explore impact of pain-points

SECTION ONE

BUSINESS STRATEGY

Understand “the why” a business owner may consider making a change to their HCM systems or workflows. While it’s possible a business may change payroll platforms for a better product, lower price, or a new feature, it’s unlikely they’ll add a new unbudgeted expense unless it underpins their higher-level business goals.

Business Strategy

Goals, Results, and Opportunities

	Minimum Questions	Essential Insights
Goals	What are your top business goals over the next 1-3 years?	- What are your revenue targets? - What products, new markets, or locations will be required to achieve those goals? - How many people will be required? What new skills will they need?
Results	How are you currently performing in relation to those goals?	- What results have you seen the past twelve months? - What obstacles are getting in the way?
Opportunities	- How will you manage the administrative burden that comes with growth? - Tell me how much time you've spent exploring employer tax credits	Capital – How would you spend or reinvest money if we found employer tax credits? Compliance – How time consuming is it keeping up with all of the administrative work of compliance? How confident are you that you're compliant with all employment laws? When you achieve those goals, what new compliance challenges will you face? Talent – Do you have the team in place today that can get you where you need to be in 1-3 years? What skill gaps exist? What changes will have to happen in: Recruiting, compensation, HR systems, compliance requirements?

SECTION TWO **EMPLOYEE LIFECYCLE**

Most small businesses already outsource payroll and tax filing to their CPA or another payroll company. But, they are largely unaware of available tax credits and are inexperienced buyers of HR services that could help them grow. If you expect them to make a change, you'll first have to help them see they can't reach their goals with what they have today. This section is organized by the employee lifecycle and lays out open-ended questions to find, quantify, and see the impact of their high-probability pain points.

Employee Lifecycle Recruiting & Hiring

MINIMUM QUESTIONS

Tell me how you source and recruit talent? Describe the steps involved in that process? Who is responsible for doing that work?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Quality Applicants	- How are you finding applicants today? Sources? - How qualified are candidates? - What tax credits are you targeting?	- How long to ramp new hires? - Cost to train new-hires? - Lost productivity?	- How does this impact on your clients? - Burdon on manager's productivity? - Drain on company culture?	- Electronic Employment Verification - Applicant Tracking - Background Checks - HR Online Library - HR Assessment Tool - Salary Benchmarking - Electronic Onboarding - Documents eSignature - Custom Handbook - HR Compliance - HR Advisor Desk - Compliance Labor Posters - HR Compliance Updates - Federal and State HR Forms
Administrative Burden	- Walk me through process: Writing job desc., job posting, posting to boards, reviewing applicants, etc..? - Who does that work? - Biggest challenges?	- How much paper vs automated? - How much time does that take? - Cost to post to job boards?	- What other things could you be doing with the time this takes from you? - What would impact be if this process was faster and automated?	
Compliance	- How do you ensure correct job classification (exempt/non-exempt)? - How do you ensure job postings comply with Fed, State, local laws?	- Who does the legal verification? What are their qualifications? - How much time do they take? - What is the cost of that time?	What's the cost of non-compliance?	
Compensation Benchmarking	- How do you know you're not overpaying or underpaying new hires? - How do you balance pay variances between new and existing staff? - How do tax credits play into compensation strategy?	- If paying above market rate, what is the cost and what productivity gain? - If paying below market rate, what is the saving and lost productivity?	- How might you spend the money if you could lower wages? - What productivity gains might be had with higher skilled workers?	

Employee Lifecycle Recruiting & Hiring

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you have written job descriptions for each opening?	76%	80%	4%
Do you conduct background checks or drug screens?	65%	81%	16%
Are you certain your job postings are compliant with federal, state, and local laws?	80%	93%	13%
Are you certain your interview process is compliant and effective?	75%	88%	13%
Are you certain your application(s) does not ask any illegal questions?	82%	86%	4%

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Employee Lifecycle Benefits

MINIMUM QUESTIONS

Describe your benefit plans: Health, 401k, etc..? How do those plans tie to your recruiting and retention strategy?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Rising Healthcare Cost	- How have rising healthcare costs impacted your benefit plans & strategy? - What tax credits are you taking advantage of?	- How much have costs gone up? - How much have you eaten vs. passed on to employees? - Coast savings from high-deductible plans with HSA?	- How have rising costs impacted employee morale? Recruiting? Retention? - How has rising cost impacted margins on the business overall?	- Proactive Health Management - Tax Credits - FSA or HSA - Asure 401k - Benefits Tracking - Earned Wage Access - COBRA Administration - Open Enrollment* - Document Storage - Documents eSignature - Employee Self Service - HR Hotline - HR Advisor Desk - HR Online Library - HR Compliance - Salary Benchmarking - HR Assessment Tool
Administrative Burden	- Take me through your open enrollment process? - How do you update changes with carriers? - Describe the paper trail to administer benefits/401k?	- How much time is this taking? - Who's doing the work and how much does their time cost? - What mistakes are happening in this process?	- What happens when Benefit carriers or 401k is out of sync with Payroll & HR? - What do employees and their families think about these processes? - How does this impact relationship with broker, TPAs, and administrators?	
Low Participation	- How satisfied are you with benefits participation? Why? - Same question for 401k?	What savings are possible with higher 401k participation?	How would better 401k participation help employees?	
Return on Investment	- How is your health plan delivering ROI? - What pre-tax section-125 plans do you offer? - How is 401k performing?	- How are benefits helping attract talent? Reduce turnover? - How much FICA reduction for 401K and section-125 plans? - How much Secure 2.0 tax credits are you currently receiving?	- How would saving \$__ impact the business overall? - How would healthier employees reduce cost and improve productivity?	

Employee Lifecycle Benefits

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you offer paid time off (sick time, maternity leave, etc.) ?	78%	83%	5%
Do you offer health insurance?	66%	90%	24%
Do you offer a wellness program?	37%	74%	37%
Do you offer a 401(k) savings plan?	50%	74%	24%
Are you certain you're compliant with Affordable Care Act requirements?	75%	85%	10%

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Employee Lifecycle Onboarding

MINIMUM QUESTIONS

Describe your onboarding process. What are your biggest challenges bringing on new staff?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Administration	- Walk me through the process of onboarding a new employee? - What are the failure points in the process?	- How much time does that take? - How many new hires make it past 3 months? 6? 9? - What's the cost of that turnover and lost productivity?	- How do new hires integrate with co-workers and other departments? - How fast do new hires start having an impact on clients?	- Applicant Tracking - Employee Onboarding - Employee Self Service - Documents eSignature - Document Storage - HR Online Library - HR Hotline - Compliance Labor Poster - Federal and State HR Forms - Electronic Employment Verification
Compliance	- How do you verify the onboarding process is compliant with Fed, State, and local laws? - Same question about employee handbook?	- Have you ever audited your I-9 process? - Who creates onboarding process and employee handbook? What's their expertise? What is the cost of their time?	How well do all employees, new and existing, understand the employee handbook? Mission, vision, and values? Harassment reporting process?	- HR Compliance Updates - HR Compliance - Proactive Health Management
Employee Experience	- How do new hires react to their first day/week experience? - How do you think that compares to your top competitors?	What specific feedback do you get from new hires at the end of their first day/week/month?	- How does the onboarding experience impact your employment brand? - After one day/week/month, are new employees excited about their choice to join or regret?	

Employee Lifecycle Onboarding

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you have an onboarding checklist for new employees?	76%	89%	13%
Do you have an employee handbook that's been updated in the past 12 months?	63%	81%	18%
Do you have a new-hire packet (or e-paperwork?)	81%	85%	4%
Do new hires go through formal orientation to learn the company's mission, vision, and values?	71%	75%	4%
Are hiring managers and staff trained how to complete I-9s compliantly?	69%	93%	24%

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Employee Lifecycle Development

MINIMUM QUESTIONS

How do you develop the talent on your team? How much more productive could your team become?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Lack of Business Growth	- How might more talented people drive growth? - How does your staff stack up vs competitors?	- What is the revenue per employee for company? - What skills are missing from workforce to get to next level?	- How do your best people impact culture? Low performers? - How do the best employees affect customer relationships?	- LMS* - Performance Management - HR Compliance - HR Advisor Desk - HR Online Library - Compliance Updates - Federal and State HR Forms - Compliance Labor Poster - HR Hotline
Leadership Development	- How well do your leaders develop their people? - How do you train managers to be come better leaders?	- What's difference in productivity from best leaders vs bad ones? - How about turnover rate?	- How do great managers impact culture? - Same question for bad managers? - How well do your managers work across departments?	
Generating Training Content	- How do you create training materials today? - Who does that work and what's their expertise?	- How much time does it take to create training content? - Who does that work and what else could they be doing?	- How would a well-trained workforce impact client relationships? - What happens when training content misses the mark?	
Compliance Expertise	- How do you verify training is based on best-practices? - Who does that work and what's their expertise?	- How big is the risk of leaders not knowing HR laws? - How big is risk of employees not knowing HR laws?	How do HR issues like discrimination or harassment impact culture?	

Employee Lifecycle Development

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you use technology resources to offer on-demand training for employees?	54%	75%	21%
Do you provide regular structured training for employees to be more effective in their jobs?	52%	82%	30%
Do you provide leadership training to managers?	51%	81%	30%
Do you offer reimbursement for tuition or training expenses?	57%	80%	23%
Do you frequently assign stretch assignments to your employees?	35%	81%	46%

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Employee Lifecycle Compliance

MINIMUM QUESTIONS

Walk me through the end-to-end payroll process from punch to paycheck? How do stay compliant with all Federal, State, and local laws? How do you know you are compliant? Who owns that responsibility?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Payroll: FLSA & Taxes	- How do comply with job classification, OT, etc..? - How do you stay compliant w/taxes? - How do you know you're compliant in these areas?	- How many corrections do you make to payroll each mo/yr? - How many tax notices have you received in past 12 months?	- What's the impact on employee morale when a paycheck is wrong? - How do corrections or amended returns impact your budget and cash flow?	- HR Online Library - Federal and State HR - Compliance Labor Poster - HR Compliance - HR Hotline
Constant Change	How do you ensure your compliance processes are up-to-date?	How often do you review and update your procedures to align with new regulations?	How would non-compliance impact business operations?	
Compliance Expertise	Who is accountable in making sure your company is in compliance?	- How many compliance violations have occurred in the past year? - Who is responsible for verifying you're compliant? How much do they cost?	How have compliance violations or the risk of compliance violations affected your business in terms of fines, legal, operational disruptions?	
Time & Resources	How do you make time for administration and compliance?	Who handles your compliance tasks? How much time does it take? At what cost?	Do you find yourself reacting to compliance matters instead of focusing on business growth?	

Employee Lifecycle Compliance

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you train managers about HR laws like equal pay, overtime, ADA, etc.?	56%	81%	25%
Do you keep a form I-9 for each person you hire and for one year after their employment ends?	84%	86%	2%
Do you have a documented process for handling HR investigations and inquiries?	62%	84%	22%
Do you conduct sexual harassment training?	55%	72%	17%
Are you certain you are compliant with wage and hour requirements according to the FLSA?	84%	92%	8%

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Employee Lifecycle Retention

MINIMUM QUESTIONS

What programs do you have in place to retain your best people? Why do people leave your firm?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Productivity Loss of Talent	- Describe the productivity gap between a new hire and fully ramped employee? - How does losing a key employee impact team productivity and quality? - How hard is it to replace an experienced team member?	- How long does it take to fully ramp up a new employee? - What is the average cost to replace a productive employee? - Who's better and landing the top talent in marketplace, you or your top competitors?	- How does turnover affect culture? - How does turnover affect employee engagement across all departments? - When you lose a key employee, how does it impact your clients? - What's the impact of losing a good employee to a competitor?	- HR Online Library - LMS* - HR Compliance - Proactive Health Management - Performance Management - HR Advisor Desk - HR Compliance Updates - HR Hotline
Loss of Expertise and Institutional Knowledge	- What's the impact on decision-making when key employees leave? - How does it affect your ability to hit revenue targets?	- What was the loss of revenue? - How long did it extend the timeframe of the project?	- Are there any initiatives that could have started if the employee did not leave? - How long did it take to train the replacement hire?	
HR Expertise	- Who builds your employee retention strategies? - What's their expertise?	- How much time does it take them? At what cost? - What other work could they be doing with that time?	Without the HR expertise in house to help retain key staff, how does turnover affect other departments? Clients?	

Employee Lifecycle Retention

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Have you surveyed your workforce to assess employee engagement?	44%	83%	39%
Do you provide career path coaching for employees?	38%	78%	40%
Do you have an employee recognition program?	49%	79%	30%
Do you conduct company-wide meetings to communicate changes and company initiatives?	74%	90%	16%
Do you conduct stay interviews to uncover employees perspectives?	36%	73%	37%

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Employee Lifecycle Performance

MINIMUM QUESTIONS

How do you incentivize performance for all employee groups? How do you measure performance? What challenges do you have in this area?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Administrative Burden	- How much time is spent on performance documentation and reporting? - How do you ensure consistent and timely feedback from managers?	- Total hours spent on managing the process? - Loss of productivity due to inefficiencies?	- How would it divert resources away from productive business functions? - How does it increase the risk of non-compliance or errors in data? - How does it contribute to higher operational costs?	- HR Online Library - HR Compliance Updates - HR Compliance - HR Hotline - Document Storage - Document eSignature - HR Training Videos - Performance Management - HR Advisor Desk
Unproductive Employees	- Do EEs have clear measurable goals - Do EEs feel undervalued and demotivated?	What percentage of EEs report confusion about their goals and priorities?	- How would improved productivity contribute to faster growth in your business? - Are you seeing misalignment between your EE's efforts and your company's goals due to unproductive staff? - How is reduced productivity affecting your business performance?	
HR Expertise to Craft Performance Strategies	Is there an opportunity to improve upon your existing strategy as it relates to performance management?	- How often are appraisals reviewed for accuracy - Are you gaining value in your current process?	- Complex or inefficient processes result can lead to frustration and turn over - Lowered overall productivity	

Employee Lifecycle Performance

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you reward high performance with recognition and higher pay?	71%	89%	18%
Do you regularly communicate expectations for job performance?	67%	83%	16%
Do you have a formal performance review process?	66%	91%	25%
Do you ever conduct 360 reviews with feedback from multiple team members?	39%	78%	39%
Do you document performance improvement plans for underperforming employees?	63%	76%	13%

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Employee Lifecycle

Post Employment

MINIMUM QUESTIONS

How confident are you that you're compliant with all laws for exiting employees? How do you know? How do former employees impact your reputation?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Compliance	- What are the laws in your state for final paycheck, PTO, etc...? (likely don't know) - How confident are you that you're compliant with FLSA and FMLA rules? - Walk me through your COBRA process (>20 emp)?	- Can you walk through the tasks involved with offboarding employees? - How much time does that take? - How many employees leave/yr? - Any prior penalties or litigation? - Take me through your process to comply with COBRA (>20 e	Do you know what the fines are for non-compliance?	- HR Online Library - HR Compliance Updates - Federal and State HR Forms - Compliance Labor Poster - HR Compliance - HR Hotline - Electronic Employment Verification - Document Storage - HR Advisor Desk
Employment brand	- How would you describe your employment brand? - If I asked former employees, what would they say? - Does community see you as an Employer of choice? - Does top talent prefer you or a competitor? Why?	- How many new hires come from employee referrals? - How much do you pay to job boards, classifieds, or recruiters? - How have employee satisfaction scores changed over time? Why? - Cost of any lawsuits from exiting employees?	- Who attracts the better talent, you or your top competitors? - Describe the 'employee brand' on existing employee morale? - How does this play out with clients?	

Employee Lifecycle Post Employment

BENCHMARK GROWTH (Questions from the 2024 HR Benchmark Report)	2024 HR Benchmark Results		
	Zero Growth	Fast Growth	+/-
Do you provide exiting employees with a termination letter?	53%	82%	29%
Do you consistently follow a written policy for final check, PTO balance, retirement plans, etc.?	68%	96%	28%
Do you conduct exit interviews with voluntary terminations?	63%	77%	14%
Are you certain you're compliant with timing and any deductions from the final paycheck?	82%	91%	9%
Are you certain you're compliant with COBRA requirements?	71%	85%	14%

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SECTION THREE

Payroll Administration

Frequently, the pain points associated with payroll administration become the trigger event that gets a business owner to engage with you. Use their 'payroll pain' as an opening to walk through the employee lifecycle questions to uncover the latent pains preventing them from growing.

Employee Lifecycle

Employee Administration

MINIMUM QUESTIONS

Walk me through the administrative process of getting people paid, from punch to paycheck to filing taxes? What do you like about your current process? What are your biggest challenges?

ESSENTIAL INSIGHTS

High % Pains	Identify Pain	Quantify Pain	Impact of Pain	Asure Plan Deliverables
Customer Support	- How easy is it to contact your support rep? - How often change your primary support rep? - Do they support only their software or your process?	- How often do payroll issues disrupt your operations due to lack of support? - What's the financial or impact of lost time when reps change frequently	- Have you faced penalties or fines - How does poor payroll support add stress and workload to your staff? - What happens when you can't reach support - How often do payroll issues disrupt your operations due to lack of support?	- Full-service payroll - Payroll Tax Filing - Direct Deposit - General Ledger Report - Garnishment Payments
Accuracy and timeliness	- Have you experienced errors in payroll tax calculations, such as incorrect withholding or employee misclassification? - How often is your payroll delayed?	- What was the cost of errors? - How frequently are you forced to make last-minute corrections? - Have you faced penalties or fines due delays in resolution?	- What are the potential consequences for your business if you miss a payroll deadline? - How does making last-minute corrections due to your provider's slow updates add stress and workload to your internal staff?	
Reporting and integration	- Have you had issues pulling historical payroll data with your current provider? - Does your current provider offer sufficient integration support with your other systems?	- How often do you have to manually transfer data between systems due to poor integrations? - How often do you experience payroll delays due to insufficient reporting capabilities?	- How does this limitation affect your ability to address issues promptly or prepare for audits? - Do you find it time-consuming to generate the reports you need from your current system?	

Appendix

- **Minimum Questions for shorter calls**

Collection of all “Minimum Questions” from each section of the GROW guide collapsed to one page for an easy reference guide on short discovery calls

Minimum Questions for shorter calls

One-page GROW Guide for quick interactions when you're unable to secure more time with business owner (15-30 mins)

	SECTION I Business Strategy		SECTION II Employee Lifecycle	SECTION III Employee Administration
Goals	What are your top business goals over the next 1-3 years?	Recruiting & Hiring	Tell me how you source and recruit talent? Describe the steps involved in that process? Who is responsible for doing that work?	- Walk me through the administrative process of getting people paid, from punch to paycheck to filing taxes? - What do you like about your current process? - What are your biggest challenges?
Results	How are you currently performing in relation to those goals?	Benefits	Describe your benefit plans: Health, 401k, etc..? How do those plans tie to your recruiting and retention strategy?	
Opportunities	- How will you manage the administrative burden that comes with growth? - Tell me how much time you've spent exploring employer tax credits	Onboarding	Describe your onboarding process. What are your biggest challenges bringing on new staff?	
		Development	How do you develop the talent on your team? How much more productive could your team become?	
		Compliance	Walk me through the end-to-end payroll process from punch to paycheck? How do you stay compliant with all Federal, State, and local laws? How do you know you are compliant? Who owns that responsibility?	
		Retention	What programs do you have in place to retain your best people? Why do people leave your firm?	
		Performance	How do you incentivize performance for all employee groups? How do you measure performance? What challenges do you have in this area?	
		Post-Emp	How confident are you that you're compliant with all laws for exiting employees? How do you know? How do former employees impact your reputation?	



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