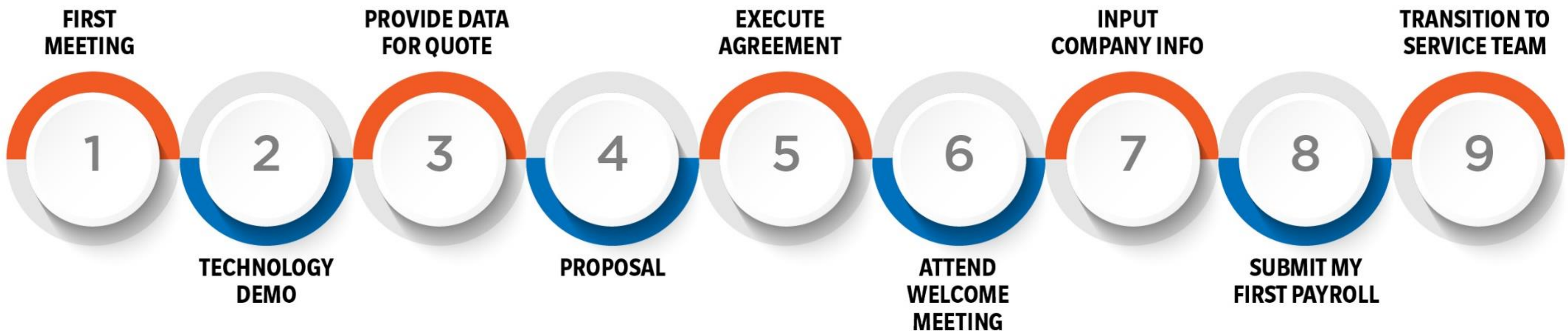
Customer Experience Guide

Your Journey to Managing Your HR Anytime, Anywhere, with Leading-edge Technology, Starts Here.

Our solutions scale with your business by consolidating the strength of thousands of small and medium size organizations to deliver access to enterprise-level benefits, digital integration and full-service HR. With HR solutions built on a continuum of more, TriNet shares your goals, dedication and passion to deliver nothing short of incredible.



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FIRST MEETING

This first meeting is an opportunity to discuss your business needs and how TriNet can support your company. This meeting will be an opportunity to dig deep into where you are today, where you want to see your organization tomorrow, and how you plan on making this all happen. Your sales consultant will answer questions and also come prepared with questions. The goal is to collaborate through this meeting to determine a fit for each other's business. If you and the sales consultant both agree there's alignment to proceed, the next steps are:

1. Set up a meeting to walk you through a demonstration of our technology to bring to life the employee experience and help you imagine the employer work flow.
2. Collect information from you so TriNet can accurately assess your organization for pricing.

EXPECTED TIMEFRAME

Per your schedule.

2 TECHNOLOGY DEMO

Your sales consultant will deliver a demonstration of TriNet's technology to:

1. Provide you with an in-depth view into employer workflow from pre-hire to post-termination. From this demonstration we will help you visualize the possibilities of what TriNet's technology can do to improve your operational process.
2. Walk you through the employee experience and bring to life what your employees will experience from day 1 of their hire date with onboarding, benefit elections, and beyond.
   Overall, this demonstration will illustrate how to manage your HR anytime, anywhere with leading-edge technology.

EXPECTED TIMEFRAME

Within 5-8 business days of Your First Meeting.

3 PROVIDE DATA FOR QUOTE

We will be asking you for a few critical items outlined in an email. This will include mutually agreed upon due dates in order to give you the best experience. The information we're requesting helps our internal teams provide you with a custom quote, and is very beneficial to aid us in creating a tailored solution.

FORMS TRINET WILL GIVE YOU TO COMPLETE

Request for Proposal

FORMS YOU'LL HAVE TO COLLECT/PROVIDE

Most Recent: MEDICAL (invoice and plan designs; complete renewal, detailed historical payroll and/or additional items may be requested if applicable), WORKERS' COMPENSATION (Declaration pages, 3-5 years Loss runs).

If requesting a Full ROI comparison, we will need to Collect: *RETIREMENT (408(b)2 Fee Disclosure Notice), MOST RECENT Invoice and plan descriptions for: Dental, Vision, Life, Short and Long Term Disability, EPLI policy, any other ancillary benefits you may have. CURRENT 3rd Party vendor fees.*

EXPECTED TIMEFRAME

Within 5 business days from your Technology Demo.

4 PROPOSAL PRESENTATION

Based on the conversations with your sales consultant concerning your business needs, they will be scheduling a meeting to present our solution tailored to everything you expressed as important to you. The presentation will include details on:

1. The value TriNet's partnership will bring your organization.
2. A benchmark analysis (comparison of TriNet to your current state).
3. Proposed timeline for acceptance and Implementation.
4. Documents Required to move forward (SUTA rate notices for Client Report states).

EXPECTED TIMEFRAME

Within 5 business days of receiving your completed data.

5 EXECUTE AGREEMENT

Upon your review and acceptance of the proposal, your sales consultant will present to you TriNet's Agreement for services. There will be some additional forms for completion such as:

1. Banking documents so TriNet can be authorized to run your payroll.
2. Power of Attorney and/or Online State Authorization forms to authorize TriNet to remit taxes on your behalf.
3. TriNet Agreement (TSR-TriNet Services Requisition Packet). These forms will be essential for onboarding your business, so they will be needed in order to get started by the paperwork deadline.

EXPECTED TIMEFRAME

Within 3 – 5 business days of your Proposal Presentation.

FORMS TO REVIEW

Implementation Guide

FORMS TO COMPLETE

TriNet Services Requisition form, TriNet banking forms, Power of Attorney/Online State Authorization form (Client Report states).

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ATTEND WELCOME MEETING

Your sales consultant will introduce you to your dedicated Implementation Consultant and HR expert. Your consultant will ask you to share with the team why you decided to partner with TriNet and any concerns you may have around onboarding and/or the overall relationship. During this meeting your dedicated team will schedule onboarding calls for setting up your TriNet portal, review and create policies, discuss your benefits funding strategy, and complete your employee upload. Our objective is to level set with your TriNet team to ensure your experience is seamless, and your transition is smooth.

EXPECTED TIMEFRAME

Within 5 days of receiving all necessary closing documents.

FORMS TO REVIEW

Implementation Tracker

FORMS TO COMPLETE

Bulk hire upload spreadsheet

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INPUT COMPANY INFORMATION

To prepare for onboarding, you are encouraged to review the Implementation Guide again, which will help walk you through the setup for your HR portal. You will receive employee entry training and enter employees into the portal. Then your Implementation Consultant will setup training meetings to walk through the online portal, payroll training, and reports training. We will also provide assistance with employee onboarding and orientation to help communicate the benefits of this exciting partnership.

EXPECTED TIMEFRAME

1 -3 business days from Welcome Meeting.

FORMS TO COMPLETE

Forms to carryover taxes paid in as applicable (Federal Unemployment Taxes-FUTA, State Unemployment Taxes-SUTA, Medicare/Social Security Taxes-FICA), and other required tax documents.

8 SUBMIT MY FIRST PAYROLL

You will submit first payroll with support of your Implementation Consultant to seamlessly pay your employees.

EXPECTED TIMEFRAME

Based on the payroll dates confirmed in the TriNet system.

9 TRANSITION TO SERVICE TEAM

After your first payroll is run, you will prepare for a transition to your dedicated Client Success Representative. Your Implementation Consultant will coordinate the introduction to ensure a successful transition. Your Customer Success Representative will be available on-demand and conduct a check in meeting with you at least every quarter to ensure TriNet is exceeding your expectations.

EXPECTED TIMEFRAME

Following your First Payroll.