

What to Expect with the Implementation Process

Obsidian HR's Implementation Process

Welcome as Obsidian HR's newest client! Obsidian HR aims to be the dominant PEO in Colorado we will immediately demonstrate our expertise and personalized experience through our proven implementation process. Our dedicated Implementation Team will set up your elected services and benefits with the help of our Client Success Partner and our Centers of Excellence. This document will detail the Implementation Process, introduce our Client Success Partner's responsibilities, and highlight key points throughout the process.

Implementation Timeline

With your help, Obsidian HR can successfully implement our services in 6 to 8 weeks. The implementation timeline is highly influenced by the client's level of complexity and ability to engage with Obsidian HR during this strenuous process. We will work together to ensure your implementation process is a success.

Implementation Questionnaire

Obsidian HR's goal is to implement our services as effectively and efficiently as possible. Immediately following the finalization of the client service agreement, our Business Development Managers will give you the Implementation Questionnaire with known data prefilled for you to complete, making the process easier for you to complete. The timely return of the Implementation Questionnaire ensures the implementation process stays on track.

Client Success Partner

The role of the Client Success Partner is designed to help guide our clients through a successful experience with Obsidian HR. The Client Success Partner serves as a continuity resource and connects you with our experts during critical service points. Clients first meet our Client Success Partner during the implementation process to ensure a smooth transition, and the relationship continues throughout the client's time with Obsidian HR.

Client Welcome Meeting

Completing the Implementation Questionnaire is the first step in the implementation process, followed by meeting your dedicated Implementation Consultant, who will schedule your Client Welcome Meeting. As a reminder, to ensure the meeting is productive, the Implementation Questionnaire will need to be completed and returned to Obsidian HR before the meeting. During the Client Welcome Meeting, you'll meet the experts working together for your success, including:

- The Business Development Manager that completed the client services agreement with you
- The Implementation Success Manager and Your Implementation Consultant
- Your Client Success Partner
- Center of Excellence Leaders from Human Resources, Benefits, Workplace Safety, and Tax & Compliance
- The Service Team Center Manager
- Obsidian HR's Vice President of Operations

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During this meeting, we will ensure all parties are aligned on the final service elections and discuss the transition process and timeline. Then we will start the Discovery Process, where we learn about your current practices and employees, and identify needs through collaborative discovery.

The Implementation Consultant will be your primary point of contact during this phase and will act as a project manager that connects you to your Client Success Partner and our in-house experts. The Implementation Success Manager is available to field more complex issues, concerns, or questions in the implementation phase as well.

Weekly Follow-Up Meetings

Your Implementation Consultant will schedule follow-up meetings with Obsidian HR subject matter experts (etc. Benefits, Tax, Human Resources, and Human Resources Information System) related to the phase of implementation and will ensure your Client Success Partner is aware of all meetings. At times, it may be necessary for your Client Success Partner to join the discussion. Should any issues arise during the implementation process related to the services contracted, your Client Success Partner will work for a resolution and coordinate their efforts with the VP of Operations, including required addendums.

System Setup

Obsidian HRs Implementation Team will configure your isolated account, our information system, based on the information gathered during the discovery process. It is during this stage that follow-up meetings are scheduled.

Systems Review/Employee Onboarding

Once Obsidian completes the system configuration, our experts review it internally before you provide the final review. Once the system is approved, Obsidian HR will launch employee onboarding.

The Employee Onboarding Process

The employee onboarding process is dependent on the number of employees. For smaller clients, onboarding emails are sent to employees, and they are directed to the information software and will utilize an onboarding wizard to complete their onboarding process. With larger employers, the bulk of their employees' information will be imported into isolated for employees to confirm.

The Implementation Consultant will coordinate with the client to notify employees that they will be receiving an onboarding email. At this point, the Implementation Consultant will send an email to employees which introduces Obsidian HR to the employees, what will be contained in the onboarding process email, and instructions. Once this process is complete, the employee can utilize the Employee Self Service Portal to make changes to their information.

Administrator, Manager, and Employee Training

Your leaders and staff can rely on Obsidian HR to provide isolated system training and answer any questions you may have. After the System Build, Administrative Client User Access is given, and administrators are trained on the following items:

- Employee Personal Information Updates

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- Initiate Onboarding
- Hiring an Employee
- I-9 Verification
- Employee Changes
- Job Updates
- Salary Updates
- Direct Deposit Updates
- Employee Terminations
- Reports

The Employee / Manager training occurs shortly before the "Go Live" date - First Day of the Pay Period that relates to their first pay date. This training covers the following information:

Manager Training Items:

- Employee - vs - Manager Roles
- Pending request approvals
- Team Calendar
- Making employee updates
- Reviewing, Editing, Approving time (if applicable)

Employee Self-Service Training Items:

- Self Service Punching (if applicable)
- Timecard (if applicable)
- Time Allocation (if applicable)
- Requesting Time Off
- Employee Absences
- Employee Calendar
- My Dashboard

Payroll Training

When it is time to complete the first payroll process, the Implementation Consultant will provide training on how to preview payroll, reports, and submit payroll. The Implementation Consultant will also preview payroll, compare to previous payroll information to ensure accuracy, and complete several audits to ensure that all data and calculations are accurate and complete.

Official Transition to Service Delivery

Once the implementation process is complete, Obsidian HR will have an internal meeting to prepare for the official transition. Your Client Success Partner is in attendance on your behalf, and afterward, you'll receive notification from your Implementation Consultant that your time with the team has ended. The Client Success Partner will stay with you as you meet your assigned service team and dedicated Payroll Services Consultant. You'll continue sending correspondence to help@obsidianhr.com for our team to

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meet your needs and ensure a successful relationship.

Employee Orientation & Open Enrollment

Open Enrollment will be completed through the Employee Self-Service Portal if benefits are elected. Additional guidance will be provided to help walk them through this process.

Client Success Partner

Your Client Success Partner will send an email three days after the transition to develop a meeting cadence for regular follow-up depending on the client's needs and address any outstanding items that require follow-up from the transition process.

As a reminder, the Client Success Partner works with each Center of Excellence Leader to resolve high-level issues. Keeping open communication with our Service Team and providing advance notice of any changes to your organization, including worksite locations, will ensure our relationship remains successful.