



EVOLVE HR

Transitioning Off the PEO

Introduction

A Professional Employer Organization, or PEO, can offer potential time, cost, and benefit savings to an organization as well as access to technology, compliance, and outsourced HR expertise. However, there comes a tipping point as an organization and the internal HR team grows to transition off the PEO. This white paper will walk you through when, how, and what is involved in transitioning off the PEO.

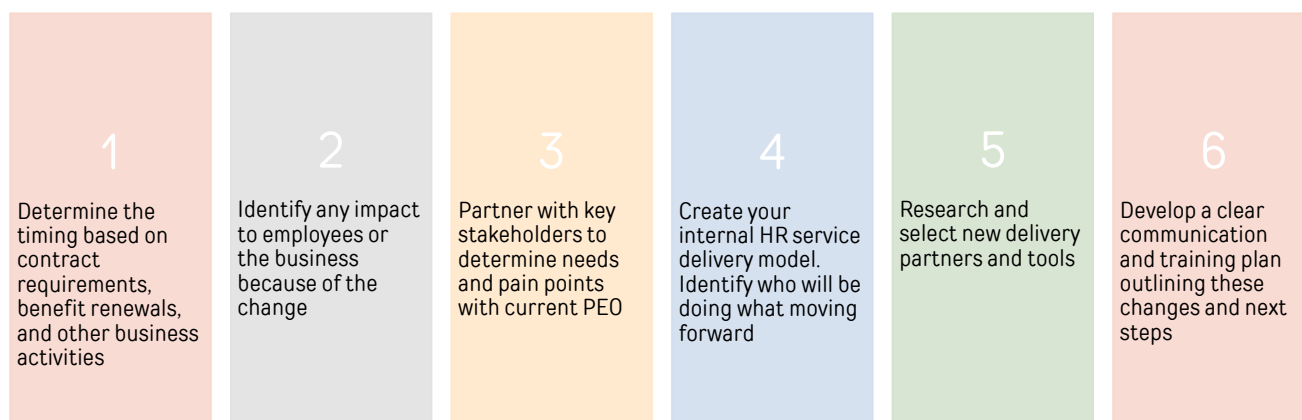
Background/Context

As a small organization, you may not have the bandwidth or HR team to successfully navigate through paying employees, offering affordable benefits, 401k, and other perks, or maintaining compliance, and managing employee relations. Maybe you would rather your existing HR team focus on employee talent development, retention, and cultural initiatives than to spend time in the administrative minutia. Whatever the case

When is the right time to transition?

- You anticipate you will be approaching 100 or more employees in the near future
- You have plans for large scale growth either organically or through acquisitions
- You have outgrown your PEO
- The HR team is feeling inhibited rather than supported by the PEO process
- You desire more control over the employee experience and benefits

How do you transition?



What is involved in making the transition?



HRIS Selection and Implementation: Identify your list of requirements and create a scorecard to measure and compare



Tax Compliance: Identify the process for setting up, taking over, or re-establishing your state unemployment tax reporting



Benefit Broker Partner: Discuss benefit options you will offer and the carrier/vendor integrations with your HRIS



401k Advisor/Fiduciary Partner: Determine what type of plan you will offer and who will handle the administration and audit



Federal and State Compliance Partner: Look for onsite and remote posting options and compliance updates



Worker's Compensation: Set up your workers compensation policy with an insurance carrier and/or work directly with the state to set-up

Key Takeaways

- The right time to transition will depend on a number of factors
- While much of the work will be tactically executing the “what”, don’t forget to spend time on the “how”
- Choose the right relationships and partners to deliver your desired outcomes
- Understand the needs of the business and the impact of the change while engaging members across the team in the discussion
- Determine how and who will be delivering the HR services ensuring all areas are covered
- Communicate the changes early and often
- Provide employee training on the new process/services for a successful transition

Evolve HR Team

Jill Lehman, Founder & Client CHRO

Jill is the Founder, Client Sr. Advisor & CHRO at Evolve HR. She began her career in retail operations and moved into a successful 25 year career in Human Resources. Jill has worked as a VP HR and CHRO in global public companies to private equity back scale ups tasked with the development and execution of HR strategies to drive organizational growth and value creation for both the business and people. Jill has extensive knowledge and expertise in transforming and scaling HR Operations, executive coaching, talent acquisition and organizational development along with deep expertise in M&A, integration, and building award winning employee experiences.

She has worked and served clients across a broad range of industries including professional services, technology, medical device, retail, supply chain and logistics.

Jill Mullens, Sr. Consultant

Jill has more than twenty years of human resources experience in both public and private equity-backed organizations across hospitality, financial services, real estate, healthcare technology, medical collections, and life sciences. Her expertise is leading and designing start-ups and scaling up HR service delivery models and programs.

Jill is detail-oriented and highly organized with the ability to multi-task and effectively communicate across all audiences. She also has a passion for teaching and coaching others to be their best both personally and professionally.

Jill utilizes her strengths as a Developer, Winning Others Over, Communication, Positivity, and Activator to make a positive impact on her clients, peers, and community.

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