

# How to Use ThinkHR at Discovery to Close Deals



#brokeradvantage

## ... Today's Webinar:

- » This webinar is being recorded—you will receive a link via email
- » Use the question box for any questions or logistical issues
- » Please take our short survey at the end of the webinar—we value your feedback
- » Tweet [#brokeradvantage](#)



... Presented by



**Josh McCullough**  
Business Development  
ThinkHR



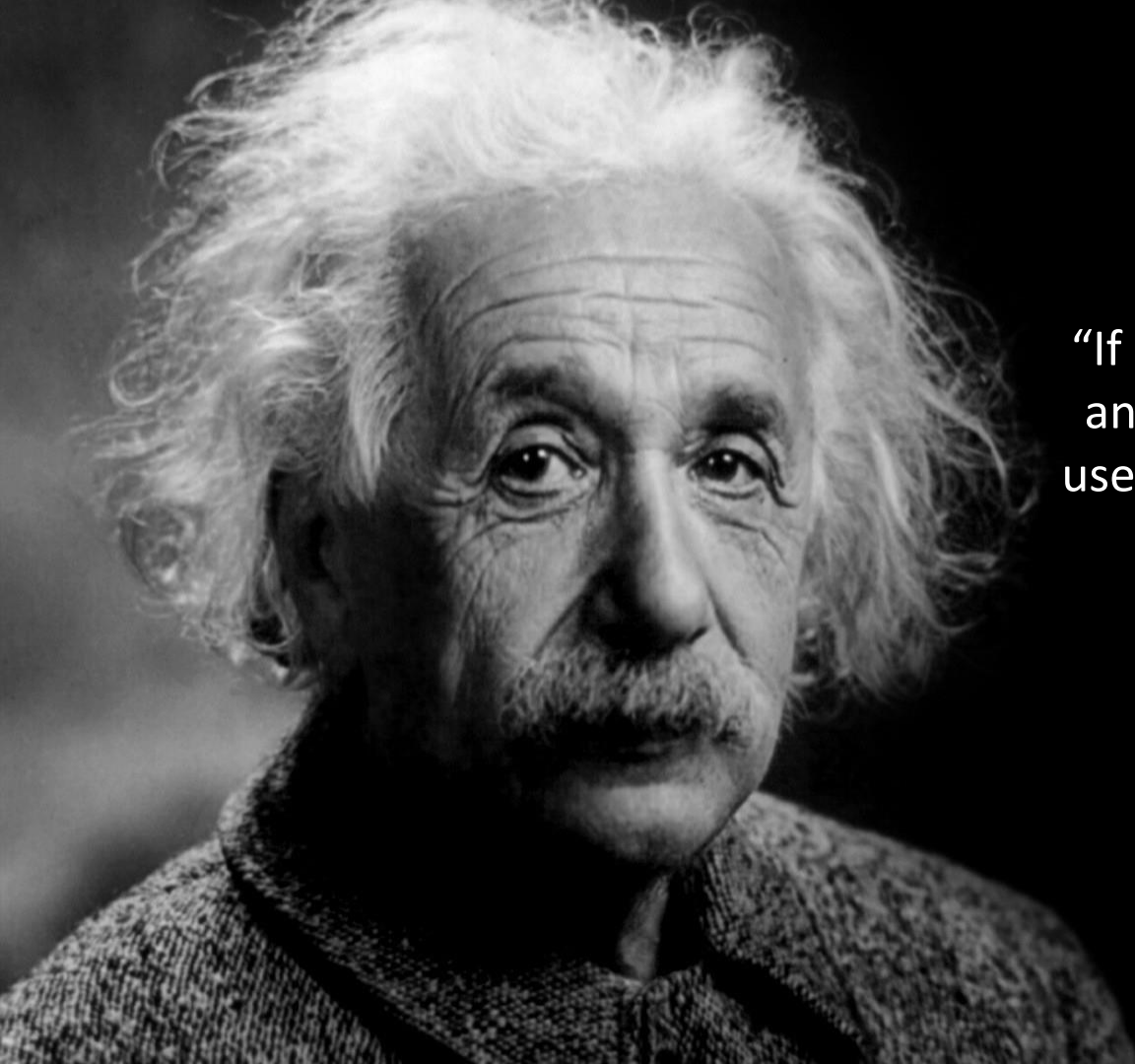
**Larkin Madden**  
Product Manager  
ThinkHR



**Russ Blakely**  
President  
Russ Blakely & Associates

# ... Using ThinkHR at Discovery to Close More Deals





“If I had an hour to solve a problem,  
and my life depended on it, I would  
use the first 55 minutes determining  
the proper questions to ask.”

-Albert Einstein

# Research Resources

Google

Top HR issues in the hospitality industry

All News Shopping Images Videos More Settings Tools

About 13,800,000 results (0.71 seconds)

- ✓ [Common HR Issues in the Hospitality Industry. - Tuesday, 29th ...](#)  
[www.4hoteliers.com/features/article/4434](#) ▾  
Sep 29, 2009 - Common **HR Issues in the Hospitality Industry**. .... The days of trust are disappearing where your **best** employee today can be your worst enemy ...
- ✓ [Problems Faced by HR in the Hospitality Sector | Chron.com](#)  
[smallbusiness.chron.com](#) > [Managing Employees](#) > [Recruiters](#) ▾  
The hospitality industry is often ripe with employee issues, and those working in human resources are left with the responsibility of fixing them. **Turnover**. **Turnover** is a problem in the hospitality sector. **Recruitment**. Training. **Morale**. Shrinkage.
- ✓ [HR Issues in Hospitality | Chron.com](#)  
[smallbusiness.chron.com](#) > [Managing Employees](#) > [Business Management](#) ▾  
Owning a company in the **hospitality industry** can be a challenge for many small business owners. Although working in this industry can be very satisfying for ...
- ✓ [Hotel Human Resources' Five Greatest Challenges - and what to do ...](#)  
[hotelsexecutive.com/.../hotel-human-resources-five-greatest-challenges-and-what-to-d...](#) ▾  
Hotel **Human Resources'** Five Greatest **Challenges** - and what to do about them ... On **top** of all of that, no one who knew what they were doing had ever inspected the rooms. ... Many employers in the **hospitality industry** conduct Exit Interviews.

# Using ThinkHR Resources

## MANUFACTURING



Employees are your #1 investment and your #1 risk. ThinkHR supports mitigation of your human capital risks.



### Manufacturing Training Courses

Unlimited access to 200+ training courses covering safety, health and wellness, sexual harassment and discrimination.

#### Manufacturing Highlights

- Back Safety and Injury Prevention (4 Spanish)
- Emergency and Disaster Preparedness
- First Aid Medical Emergencies
- Forklift Operator (5 Courses)
- Industrial Ergonomics
- Lift/Lifted/Trip/Fall Courses including Spanish
- Machine Guarding
- Slips, Trips, and Falls (4 Spanish)
- Union Awareness
- Workplace Conflict: Recognizing and Responding
- Workplace Conflict: Strategies for Resolving Conflict

#### More HR tools for your business:

- Forms and templates
- Employment law alerts
- ACA and related compliance information
- Mobile app

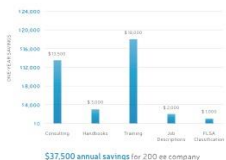
thinkhr.com | 855.271.1050

## HEALTHCARE



Hospitals, physicians and medical groups, senior care, home health

Employees are your #1 investment and your #1 risk. ThinkHR supports mitigation of your human capital risks.



### Healthcare Training Courses

Unlimited access to 200+ training courses covering safety, OSHA, health and wellness, sexual harassment and discrimination.

#### Healthcare Highlights

- Back Safety and Injury Prevention (4 Spanish)
- Biosafety/Hazardous Waste Handling and Disposal
- Bloodborne Pathogen Awareness
- Bullying and Violence in the Workplace
- HIPAA (5 Courses)
- Listening Essentials (2 Courses)
- Pandemic Flu Awareness
- Promoting a Substance-Free Workplace
- Slips, Trips, and Falls (4 Spanish)
- Working with Difficult People (7 Courses)

#### More HR tools for your business:

- Forms and templates
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- ACA and related compliance information
- Mobile app

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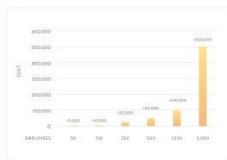
Unlimited, expert HR consulting is a phone call or email away. Obtain guidance and advice on these critical areas to help mitigate human capital risks:

- Hiring/firing
- Wage and hour
- Leaves of absence
- Statutory compliance
- ACA
- Workers' compensation
- ADA accommodations
- and more!

"I love this service. My questions would have taken me hours to research and it was answered completely, with links that pertain to my question. Thank you!"

—Caitlyn W., Regional Hospital System, Business, TX

Average Cost of Training per course/per year



4637 Chabot Drive, Suite 200, Pleasanton, CA 94588

## BUSINESS SERVICES TRAINING COURSES

Every industry has different compliance and employee development needs. At ThinkHR, we want to guide you through it. Below is a list of training courses commonly taken in your industry.

#### Compliance

- Alternative Dispute Resolution (ADR) What You Need to Know
- Complying with Family and Medical Leave Act (FMLA)
- Employment Law for Supervisors
- FLSA - What Supervisors Need to Know
- HIPAA - Your Obligations Under the Privacy Rule
- Privacy for Supervisors
- Sexual Harassment - What Employers and Supervisors Need to Know
- Small Business Retirement for Management and Supervisors
- California (AD 925/9252) - applies to employers with over 50 employees
- The NLRB Inspection and Questionnaire Presentation
- Understanding OSHA - for Supervisors
- Workers' Compensation - What Supervisors Have to Know
- Disciplinary Assessment - What Employers and Supervisors Need to Know

#### Customer Service

- Engaging with Customers
- Customer Service Skills - How the Call Center Works
- Handling Customer Complaints
- Building the Customer Mindset
- The Art of Listening

#### Human Resources

- Business Ethics - What Employees Need to Know
- Employee Dispute Resolution: From A to Z
- HRing
- Recruitment Inventory for Employers and Supervisors
- Workplace Checks for Supervisors

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## EDUCATION TRAINING COURSES

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- Disciplinary Assessment - What Employers and Supervisors Need to Know

#### Safety

- Accident Investigations
- Asbestos Awareness
- Bloodborne Pathogens
- Emergency Action and Fire Prevention
- Forklift Operator
- Ladder Safety
- Lockout/Tagout - Authorized Employee
- Slips, Trips, & Falls
- Working at Height: Scaffolding
- Workplace Safety for Employees

#### Wellness

- Stress Management
- Supervisor Alcohol and Medication - What Employers and Supervisors Need to Know
- Wellness and You
- What You Need to Know about Identity Theft

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ThinkHR



# Pre-meeting Discussions, Questionnaires and Surveys



## HR CHALLENGES CHECKLIST

DO YOU EVER HAVE THESE CHALLENGES?

ThinkHR gives employers access to the best strategies, tools and support to perform the following:

- Assess HR risks/costs/opportunities**
  - ▶ Audits, surveys, HR department improvement plan, ThinkHR Live access
- Hire great employees**
  - ▶ Training modules, webinars, sample offer letters, ThinkHR Live access
- Keep and motivate great employees**
  - ▶ Training modules, retention program analysis, ThinkHR Live access
- Manage employee performance**
  - ▶ Training modules, webinars, personnel forms, building exercises, ThinkHR Live access
- Manage employee discipline, termination and layoffs**
  - ▶ Training modules, personnel forms, checklists, investigation tools, COBRA forms, ThinkHR Live access
- Manage employee leaves**
  - ▶ Training modules, ADA, FMLA, return to work, personnel forms, webinars, ThinkHR Live access
- Leadership, management and HR training**
  - ▶ HRCI- and SHRM-certified webinars, training modules, special reports, strategicHR program, ThinkHR Live access
- Prevent destructive employee lawsuits**
  - ▶ Employee handbook builder, training modules, ThinkHR Live access

ThinkHR Live consists of a team of HR experts standing by to answer questions and provide advice. Available via phone from 8 a.m. to 7 p.m. Central time each business day or via email anytime. ThinkHR's Live team of experienced HR Advisors are there when you need them to point you in the right direction, offer a second opinion, or coach you through urgent workforce issues.

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## 35 CRITICAL HUMAN RESOURCES PROCESSES THINKHR ADDRESSES

With ThinkHR, employers have access to information, tools, and live support so they can confidently:

1. Identify the human resources (HR) risks, opportunities, and costs at their company
2. Create job descriptions
3. Define hiring procedures
4. Develop forms and tools for various HR actions
5. Conduct skills testing and background checks
6. Conduct pre-hire physicals
7. Create new employee documents
8. Maintain and retain personnel files
9. Design and conduct employee onboarding programs
10. Create a system for employee suggestions
11. Manage time and attendance
12. Handle overtime requests and authorizations
13. Determine overtime exemption status
14. Develop and implement performance improvement processes
15. Manage poor performance, behavior issues, and discipline
16. Create off-boarding processes and termination procedures
17. Process family and medical leaves and other time off programs
18. Manage accommodation requests
19. Handle complaints and work conflicts
20. Investigate wrongful conduct
21. Manage home-based workers and telecommuting issues
22. Manage independent contractors, contingent workers and other "joint employee" arrangements
23. Manage requests for transfer, demotion, or promotion
24. Develop and manage total compensation programs
25. Design and implement recruiting programs
26. Create employee handbooks
27. Create and implement strategies for increased employee engagement
28. Create ethics and work behavior policies
29. Develop team building programs
30. Develop and conduct compliance, leadership, and management training
31. Conduct employee climate surveys and develop action plans based on the feedback
32. Conduct HR audits and determine risk mitigation plans
33. Implement strategic HR processes and tools
34. Manage workers' compensation administration and reporting requirements
35. Provide on-demand guidance from experienced HR professionals

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## QUICK HR AUDIT

MITIGATE YOUR HR RISKS

**IF YOU CAN'T ANSWER EVERY ONE OF THE QUESTIONS BELOW WITH A "YES," YOUR BUSINESS IS UNNECESSARILY EXPOSED TO CONSIDERABLE RISK**

YES	NO	Do you know the pre-hire steps you should follow to ensure you don't hire an employee with a poor work or attendance history?
YES	NO	Are you certain you have properly classified employees as exempt so that no overtime payments are required?
YES	NO	Is your employee handbook up to date and checked by an employment lawyer?
YES	NO	Have you conducted discrimination and harassment training of your managers?
YES	NO	Have you organized your employee leave programs (ADA, FMLA, return to work, PTO, absenteeism), and communicated them to your employees?
YES	NO	Are you certain that any independent contractors are properly classified?
YES	NO	Do you know how to protect yourself from employee abuse of social media?
YES	NO	Do you have a process to manage employee complaints, discipline, and terminations designed to keep you out of court?

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Poll



Open and Honest  
Discovery Conversation

## ••• Guided Questions get the Dialogue Going

“Many of the retailers that we’ve partnered with face challenges with seasonal employees and issues that come with high turnover. Have you experienced similar challenges in those areas?”

# ... Always Ask Your M.O.M.

How **m**uch?

How **o**ften?

How **m**any?





## HR PRACTICE CALCULATOR

THE TRUE COST OF YOUR HR PRACTICES

# HR Practice Calculator

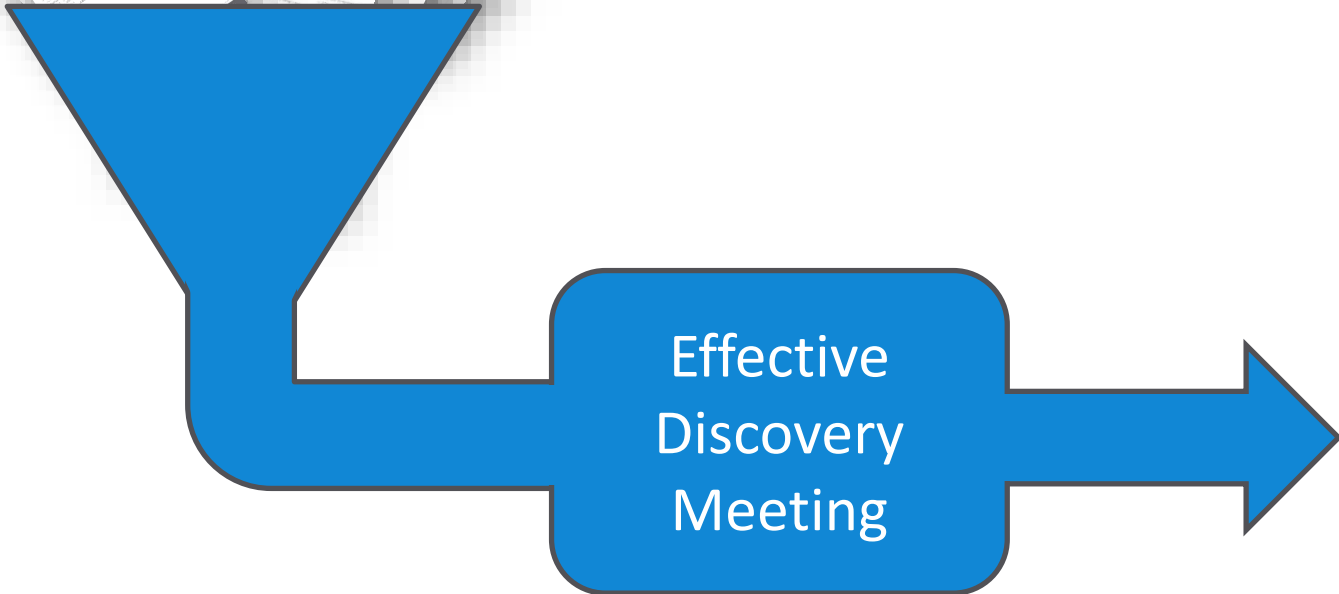
Few executives fully understand the cost of their HR practices. Use this tool as a quick indication of your weak spots and financial growth opportunities.

How much did <b>bad hires</b> cost over the last 12 months? Use an average of 1:1 ratio of their annual pay. For example, an employee with a \$50,000/year salary will cost \$50,000.	<b>\$65,000</b>
How much did <b>losing any good employees</b> cost over the last 12 months? Again, use at least a 1:1 ratio.	<b>\$250,000</b>
What would be the bottom-line impact of <b>improving total productivity</b> by only 5%? Use 5% of total payroll. (For example: \$1,000,000 x .05 = \$50,000)	<b>\$150,000</b>
What is it costing you to keep <b>poor employees</b> ? (Here's the test: If they quit, would you be relieved or upset?) Use the impact they have on their entire team in your calculation. (For example: team payroll = \$240,000 x .05 = \$12,000)	<b>\$30,000</b>
What "bang for the buck" are you getting for any <b>benefits</b> paid? What if you improved that figure by 2%? (Use a benefits cost of 35% of payroll. For example: \$350,000 x .02 = \$7,000)	<b>\$15,000</b>
What added costs are you paying with your annual <b>workers' compensation</b> modifier due to your risk management and return to work practices? (For example, a MOD of 1.2 means you pay more than your competition.)	<b>\$175,000</b>
Did you have to manage and/or settle even a low-level <b>employee claim</b> ? (Statistically, 1 in 4 get sued every year with an average verdict of \$250,000)	<b>none</b>
<b>Your HR cost total:</b>	<b>\$685,000</b>
How much revenue will you have to bring in to put these HR dollars back into your pocket? Use at least a 3 to 1 ratio.	
<b>Revenue total:</b>	<b>\$4.75M</b>

## ••• Earn the Right to Ask “Sky’s the Limit” Questions

“Imagine we’re three years down the road. We’ve been working together for three years and you’re ecstatic with the results we’ve created. What would some of those results be?”

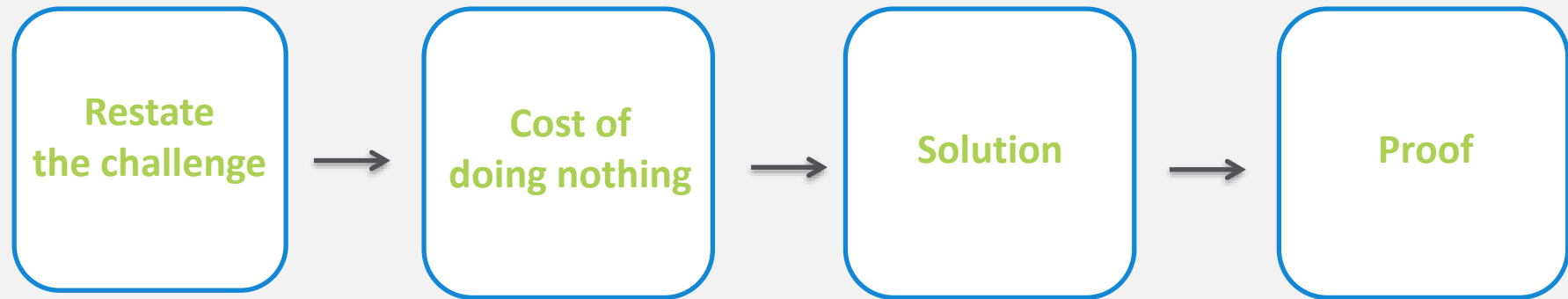
- Chad Jenkins, Blueprint Consulting



Effective  
Discovery  
Meeting

**B.O.R.**

## ... Closing the Deal





**Holland, Inc.**

TOTAL VALUE OF SERVICES **\$45,855**

Company Size: 50-100 Employees

Date: June 1, 2015 - June 1, 2016



25

Live Consultations and  
Issues Resolved

**\$6,250**

VALUE



15

Handbooks  
In Progress and Completed

**\$16,875**

VALUE



521

Comply  
Views

**\$2,605**

VALUE



161

Training  
Courses

**\$20,125**

VALUE

**Annual Comparison**

A typical organization with 50-100 employees has the following annual usage.

TOTAL VALUE OF SERVICES **\$66,000**

**Proof**

“Here’s some of the ways we’re solving this problem for our partners...”

# ... Using ThinkHR at Discovery to Win More Business



# Comply

## Tools:

- » Audits
- » Checklists
- » Employee Handbook Builder
- » FLSA Overtime Regulations
- » Webinars Library

## Employee Handbook Self-Audit

### Questions

1. Has the organization developed policies and procedures dealing with the following:

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| Wages?                                    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Benefits?                                 | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Employee relations?                       | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Day-to-day operations and administration? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| HR management?                            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

2. How are these policies and procedures communicated to employees?

- Orally and by having them read them?
- In written memos and handbooks?
- Through the use of email?
- By posting an electronic version?

3. If the organization has a handbook, how is it maintained?

- To help answer the organization's needs?
- To help answer routine questions?
- To help create positive employee relations?
- To communicate important information?
- To contribute to organizational success?
- To comply with legal requirements?
- To delineate the organization's policies?
- Other?

4. Has the organization a regular system for monitoring and auditing its human resources practices to ensure compliance with applicable state and federal regulations?

5. Does the employee handbook contain the following information?

## HR Audit Checklist

Every business faces challenges with various rules, laws, regulations, and general business issues. The purpose of this questionnaire is to highlight the key areas of human resources activities that could pose risks to the business if not done or improperly managed. You can complete the entire questionnaire or focus only on one or more of the sections that are of most concern to you. With your responses, the questionnaire answer will provide you with more information about what, why, and how that topic is important in your risk mitigation program.

### General Company Questions

Progress: 0%

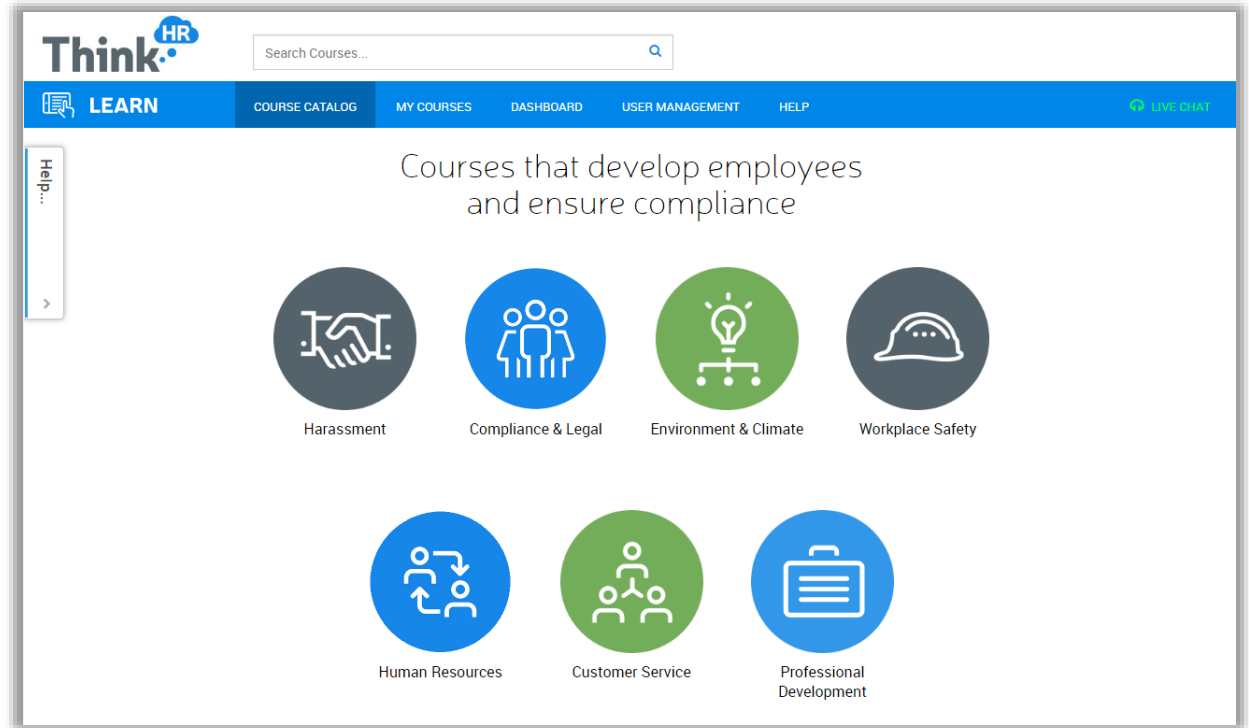
#### Questions

- Are you a federal or state government contractor?  Yes  No
- Do you know the employment laws and regulations impacting an organization of your size (by number of employees)?  Yes  No
- Do you intend to either hire more people or shrink your workforce this year?  Yes  No
- Do you have unions subject to a collective-bargaining agreement?  Yes  No
- Do you have a regular system for monitoring and auditing your human resources to ensure compliance with applicable state and federal regulations?  Yes  No
- Have you had any employment practice claims in the last three years (including, but not limited to, NLRB, DOL, EEOC, FLSA, state agencies, mediations, arbitrations, administrative hearings, internal grievances, and attorney demands)?  Yes  No
- Do you have employment practices liability insurance coverage?  Yes  No
- Is your management personnel trained in human resources practices and compliance with company policies and the law?  Yes  No

[Skip](#) [Next](#) [Save](#)

# Learn

A training solution that mitigates risk and saves your clients money.



# ....Live

Guidance on topics like:

- » ACA
- » Safety
- » Terminations
- » Compliance
- » State and federal laws
- » And much more!



## Strategic Selling

[150 things to worry about in HR](#)[35 HR Challenges ThinkHR Answers](#)[Great HR Practices Checklist](#)[HR Challenges Checklist](#)[HR Practice Calculator](#)[Partner Sales Kit: Email Templates - Client](#)[Partner Sales Kit: Email Templates - Prospect](#)[Partner Sales Kit: HR Scorecard](#)[Partner Sales Kit: Questions to ask a client](#)[Partner Sales Kit: Questions to ask a prospect](#)[Partner Sales Kit: Solutions for Clients \(PPT\)](#)[Partner Sales Kit: Solutions for Prospects \(PPT\)](#)

# ••• Demo Calls

Use our tools for prospecting:

- » Call the Live team
- » Submit a question using the mobile app
- » Ask your Customer Success Manager to conduct a demo of the ThinkHR tools
- » Use in the Partner Sales Kit



## HR PRACTICE CALCULATOR

THE TRUE COST OF YOUR HR PRACTICES

Few executives fully understand the cost of their HR practices. Use this tool as a quick indication of your weak spots and financial growth opportunities.

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.....

Did you have to manage and/or settle even a low-level **employee claim**? (Statistically, 1 in 4 employers are sued every year with an average verdict of \$250,000)

.....

Your HR cost total:

# ... Russ Blakely & Associates



Employee Benefits Advisors

Founded in 1982

17 employees and 150 accounts

ThinkHR partner since 2011



# ••• Top Areas of Usage

- » Live Hotline
- » Policies and Forms
- » Employee Handbook Builder

**WEBINAR:** Two Dates Available: Thursday, January 19, and Tuesday, January 24 at 8:30 am Pacific

## It's Time to Update Your Employee Handbook

### Overview

Are you dreading updating your employee handbook? You're not alone! Most of today's HR professionals can agree that employee handbooks can be a handful.

Join Robin Shea and the ThinkHR team as they cover some best practices for creating an employee handbook.

In this one-hour session, we'll go into detail about:

Content every handbook should have plus content you might want to include and why

- How handbooks can help maintain a vibrant company culture
- New 2016 laws that impact employer policies
- How the Trump Administration may impact employer policies

Interested in more ThinkHR webinars? Check out our upcoming webinars [here](#).

This webinar offers 1 HRCI and SHRM-approved credit.

### Register now

First Name: \*

Last Name: \*

Company Name: \*

Email Address: \*

Webinar Date: \*

Select... ▼

Broker/payroll company that sponsors your ThinkHR subscription \*

Register Now

# Russ Blakely & Associates

- » Give clients a free trial of ThinkHR
- » Use the HR Scorecard
- » ACA forms and cheat sheets

## The HR Scorecard

Help us understand your current situation. Please complete the scorecard by circling the number that most reflects your thoughts on each paired phrase.

	LEVEL 1						LEVEL 5
A	I've spent hundreds of hours and thousands of dollars trying to solve HR issues.	1	2	3	4	5	I have an expert HR team to call whenever I have questions I can't answer on my own.
B	My hiring practices need fine-tuning but I don't know where to start.	1	2	3	4	5	I have access to best practice checklists for hiring and retention, new hire toolkits and interviewing training courses.
C	I can't keep up with the constantly changing employment laws to make sure my business is compliant.	1	2	3	4	5	I'm fully aware of state and federal employment law changes.
D	I worry my benefits administration and payroll practices may trigger penalties or fines for being out of compliance with the new laws.	1	2	3	4	5	I am knowledgeable of payroll and benefits rules and am prepared for IRS or DOL compliance audits.
E	I know I need to train my employees but I can't afford the expense.	1	2	3	4	5	I have an affordable training solution for my employees.
F	I am so busy managing my operations and customers that I don't have time or resources to focus on human resources.	1	2	3	4	5	I have the resources and tools to conduct an HR audit and HR experts to help me set my HR priorities.
G	I'm not sure when we last updated the employee handbook.	1	2	3	4	5	I can access my employee handbook online and am able to update it easily.
H	I search and copy generic job descriptions from the internet for use in recruiting, onboarding and benefits administration.	1	2	3	4	5	I have a job description tool to customize individual jobs to improve recruiting, performance management, and disability accommodation and return-to-work analyses.
I	We do not have a formal process for	1	2	3	4	5	I have access to best practices for employee

## Learn more

### For current partners:

- » If you would like to learn more about any of the resources discussed on today's webinar, contact your Customer Success Manager.

### For prospective partners:

- » If you are interested in learning more about a partnership with ThinkHR, please type "partnership" in the question box and a representative will follow up.



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