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Streamline Payroll and Workforce Management: CLA and ADP's Workforce Now

August 1, 2023

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Objectives

- Streamline Payroll and HR processes
- Improve data accuracy
- Use analytics to make better decisions
- Control costs with real-time

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About CLA

Background and knowledge

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The **Four Essential Elements** Of The CLA Promise

Our Purpose

CLA exists to create opportunities — for our clients, our people, and our communities.

Our Promise

We promise to know you and help you.

Our Family Culture

We're one family, working together to create opportunities.

Our Strategic Advantages

Deep industry specialization

Seamless, integrated capabilities

Premier resource for private business and owners

Inspired careers

Driven by **Our Values**

Curious

We care, we listen, we get to know you

Collaborative

We help you seamlessly, bringing innovative teams to the table

Transparent

We communicate clearly and authentically

Inclusive

We embrace all voices and create opportunities for you in an energetic and inspiring environment

Reliable

We respond in hours, not days; we follow through, protect our client data, and produce quality results

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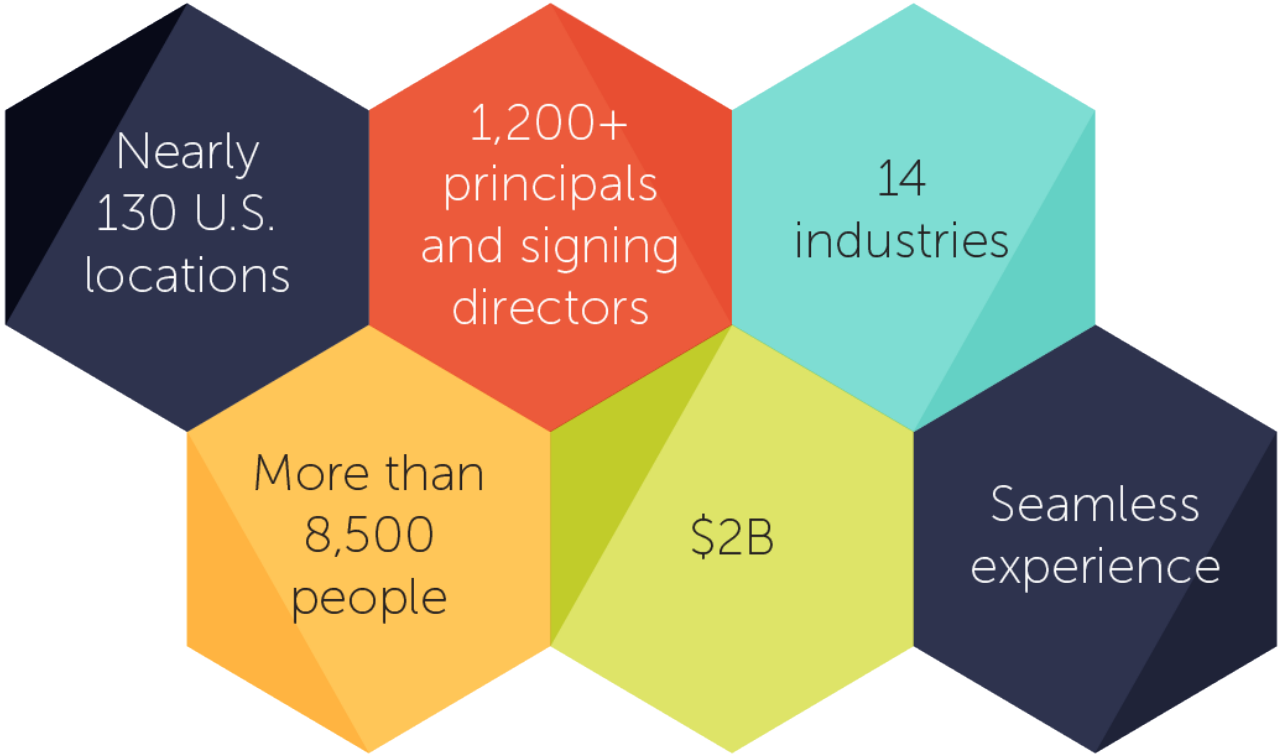
Facts: The Basics



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Deep Industry Specialization

- Agribusiness and cooperatives
- Construction
- Federal government
- Financial services
- Health care and life sciences
- Higher education
- Manufacturing and distribution
- Nonprofit
- Professional service organizations
- Real estate and private equity
- Retail
- State and local government
- Technology
- Transportation and logistics

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Services

Audit, accounting, and assurance	Business and leadership transitions	Consulting	Digital	Employee benefit plans
Global	Growth strategies	Human resources and search	M&A advisory and investment banking	Outsourcing
Cybersecurity and risk management	Tax	Tax education for CPAs	Wealth advisory	

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Talent Solutions:
HR Systems and Payroll

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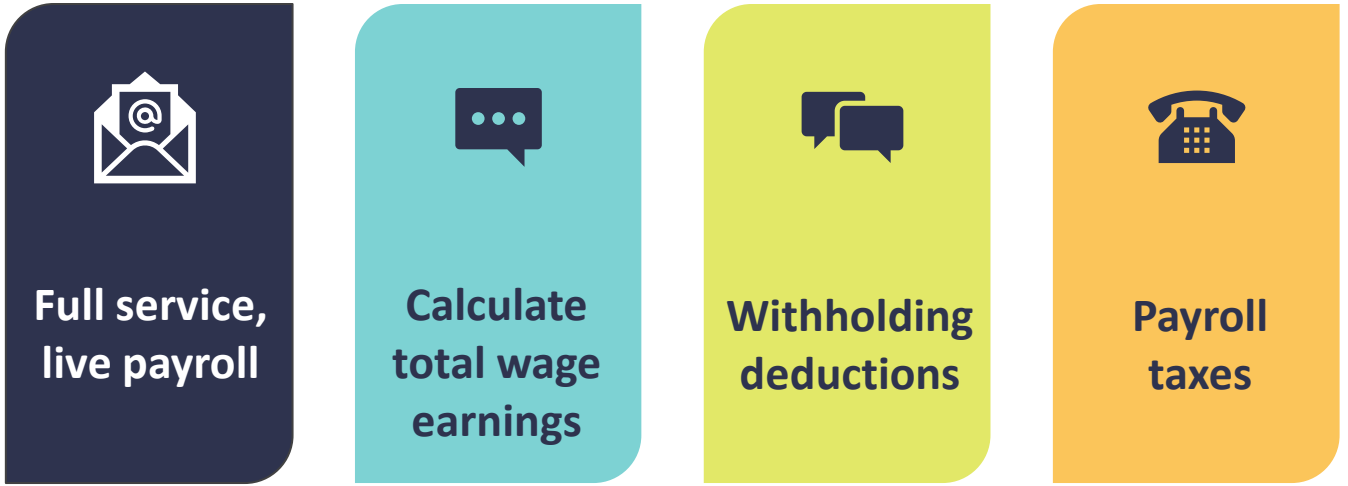
HR Systems and Payroll

What do we do?

- Create employee payroll checks and direct deposit processing; new hire reporting; payroll tax deposits and filings; W-2 preparation and processing; garnishment processing; employee self-service; time off accrual and balance tracking; general ledger reporting



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CLA Employment Tax Consulting

Payroll Tax Registrations

- Withholding
- Unemployment
- Local
- Family leave
- Disability

Remote Employees

- Jurisdiction analysis
- Resident/non-resident assessment

Compliance

- Tax notice resolution
- SUI taxability issues
- Assist to resolve filing errors

Multi-State Taxation

- Withholding/reciprocity agreement compliance
- Assist with abatement of tax notices

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CLA and ADP Relationship

- Why consider the CLA & ADP Relationship for my outsourced payroll provider?
  - Dedicated sales, service, and implementation team.
  - Provide consultative outsourced payroll & HCM solutions.
  - Solutions to enhance organizational efficiencies through streamlining and automation.

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Key Implementation Considerations

Scoping	• Scoping call to dive deeper into the payroll needs and software. Gain understanding of current and discover costs associated with implementation as well as standardized monthly/annual costs.
Implementation Timeline	• Develop a strategic process to ensure consistent and quality implementations, which includes project management.
Roles & Responsibilities	• Define clear roles and responsibilities for CLA and the Client to ensure deliverables are understood throughout the process.

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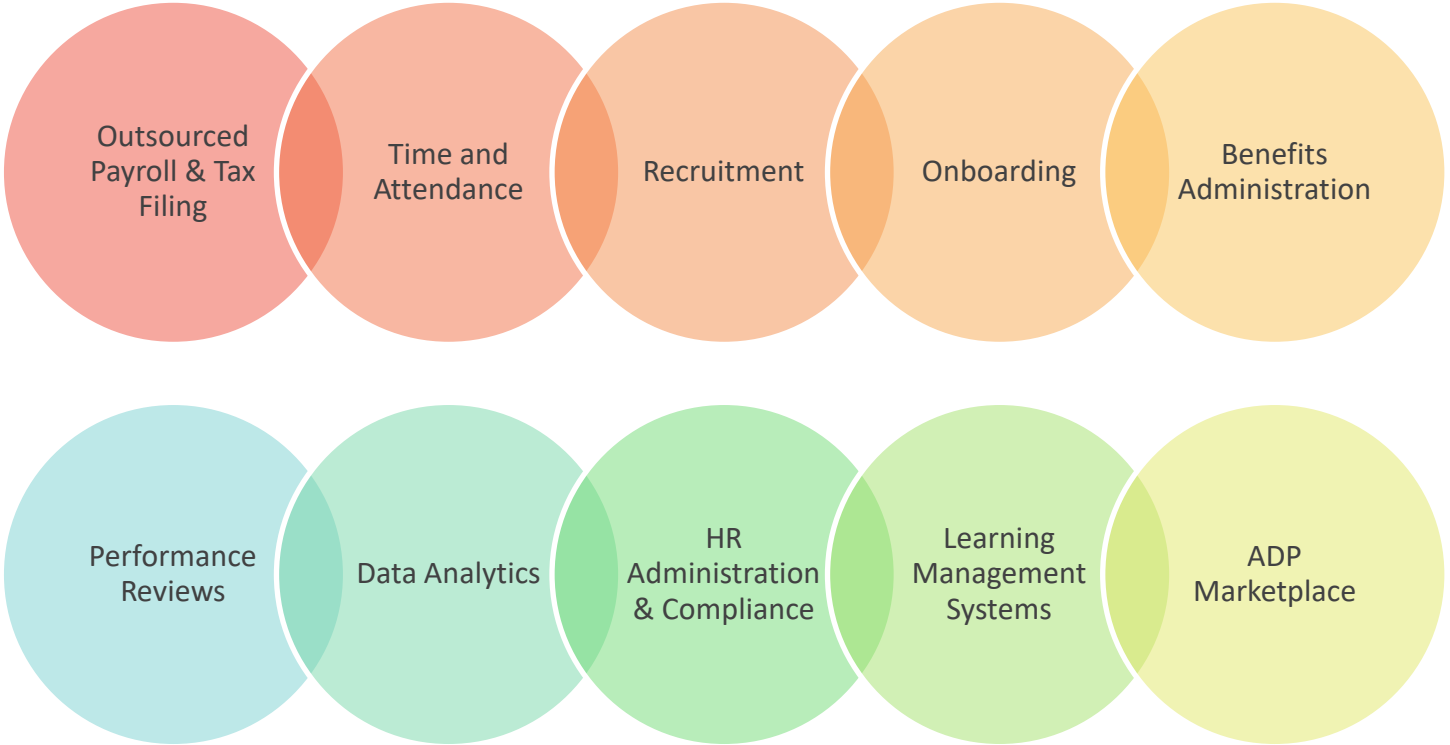
ADP Workforce Now – More Than Just Payroll



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ADP:
CLA & ADP Relationship

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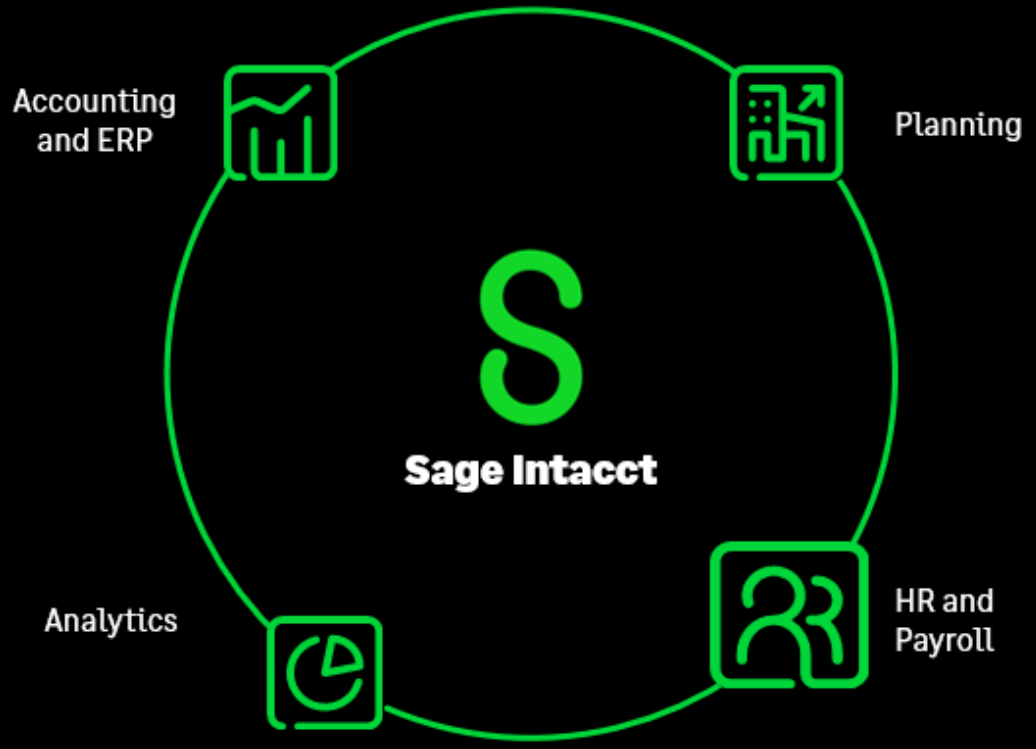
Sage Intacct

Seamlessly connected where it matters most for accounting and finance leaders, so you can thrive in today's digital world



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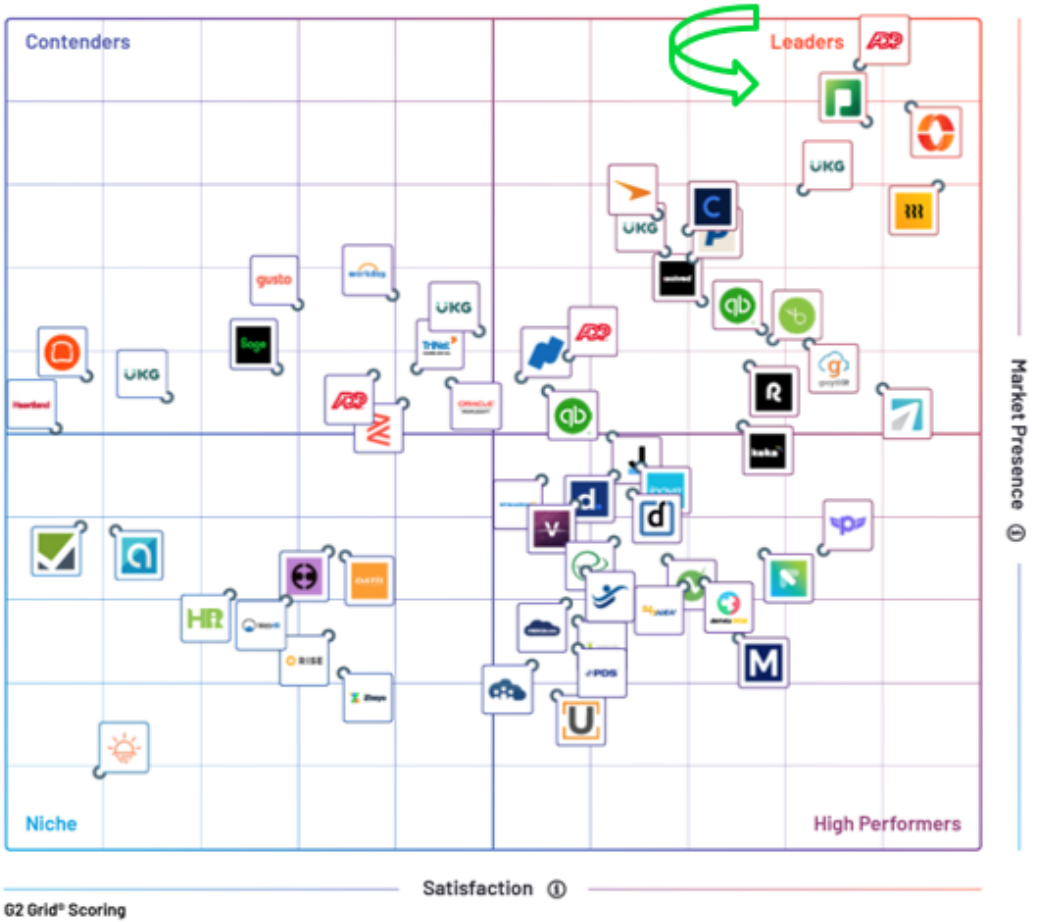
A trusted solution for your payroll

- Powered by ADP's Workforce Now© Platform. The market leader medium sized businesses.
- A full-service payroll platform that can handle almost any payroll use case – no matter how complex
- Anywhere, anytime access, employee self service and a top-rated mobile experience



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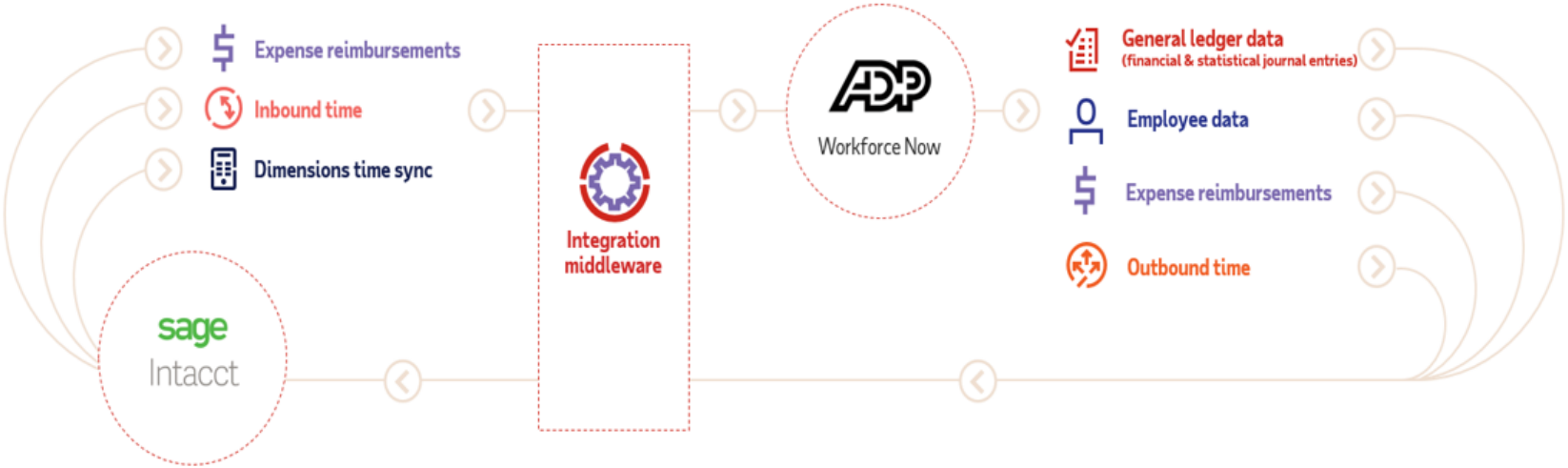
Sage Intacct Payroll- Integration Points



General ledger data: Push of journal entries from ADP Workforce Now GLI into Sage Intacct General Ledger. Includes financial & statistical journal entries.

Employee data: Push of employee changes entered in ADP Workforce Now to Sage Intacct Contact and Employee Records.

Expense reimbursements: A 360 integration with expense reports inbound from Sage Intacct Time & Expenses application to ADP Workforce Now and the recording of the reimbursement outbound from ADP Workforce Now to Sage Intacct Time & Expenses Reimbursements.

Inbound time: Pulls timesheet data from Sage Intacct Time & Expenses into ADP Workforce Now Essential Time.

Outbound time: Push of timecard data from ADP Workforce Now Essential Time to Sage Intacct Time & Expenses Timesheets.

Dimensions time sync: Pull of dimension values from Sage Intacct to ADP Workforce Now Essential Time labor charge fields.

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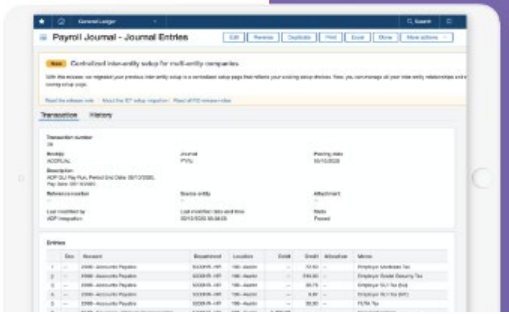
Seamlessly integrated to Sage Intacct

- Developed as a collaboration between ADP and Sage Intacct.
- Quickly deployed without the need for extensive customization
- GL, Dimensions, Time, Expenses and more are all included
- Saves time, reduces errors, enables insights – customers love this integration

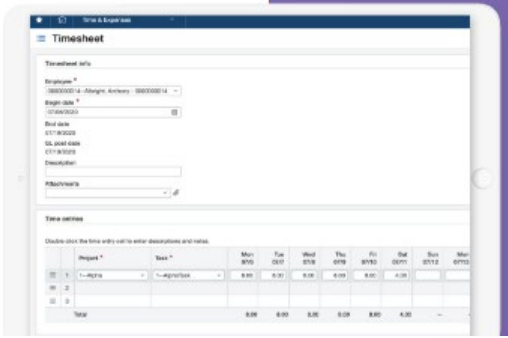
Enhance the quality of your reporting needs:

Payroll and statistical journal entries are passed from ADP's General Ledger Interface system following a payroll cycle, including dimensions which enhances the quality of reporting.



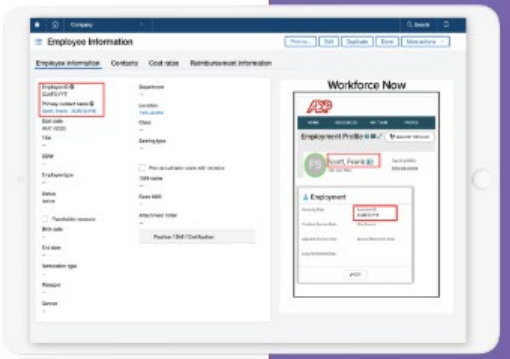
Gain control over your employees time data:

Manage the data in the system of record that you prefer and then pull or push time entries and dimensions to gain business process efficiencies.



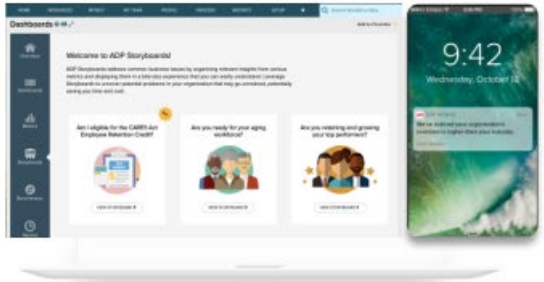
Integrate HR data into your financial systems:

Take employee information and add it to your business management processes: employee ID, name, address, email, department, location, pay rate, reports to manager and more.



ADP DataCloud Overview

People Analytics



- **Metrics**: 100+ HCM metrics on desktop
- **Executive and Manager Insights:** Intelligent, push insights via ADP mobile app
- **Org Snapshot:** Surface key metrics that matter to your workforce
- **Storyboards**: Story-telling approach to analytics
- **DEI Dashboard:** Question-based overview of diversity, equity and inclusion in your organization New

Enhanced Insights

- **Benchmarks**: on 30+ metrics (e.g., turnover)
- **Compensation Benchmarking:** Annual Compensation, Workforce Compensation Analysis New
- **Turnover Prediction:** Web-based explorer and push insights for managers via mobile (coming soon) New
- **Data Mashup:** BI connectors (e.g. Tableau), Data Ingestion
- **Org Benchmarks:** compare your headcount / span of control to industry peers New

Embedded Intelligence

- **Recruiting:** ML-driven candidate matching and embedded salary benchmarks in WFN Recruiting and RM New
- **Time:** push insights surfacing key anomalies (e.g., missed punches, late ins) in supervisor / manager workflow

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ADP® DataCloud

Optimizing your company's pay competiveness

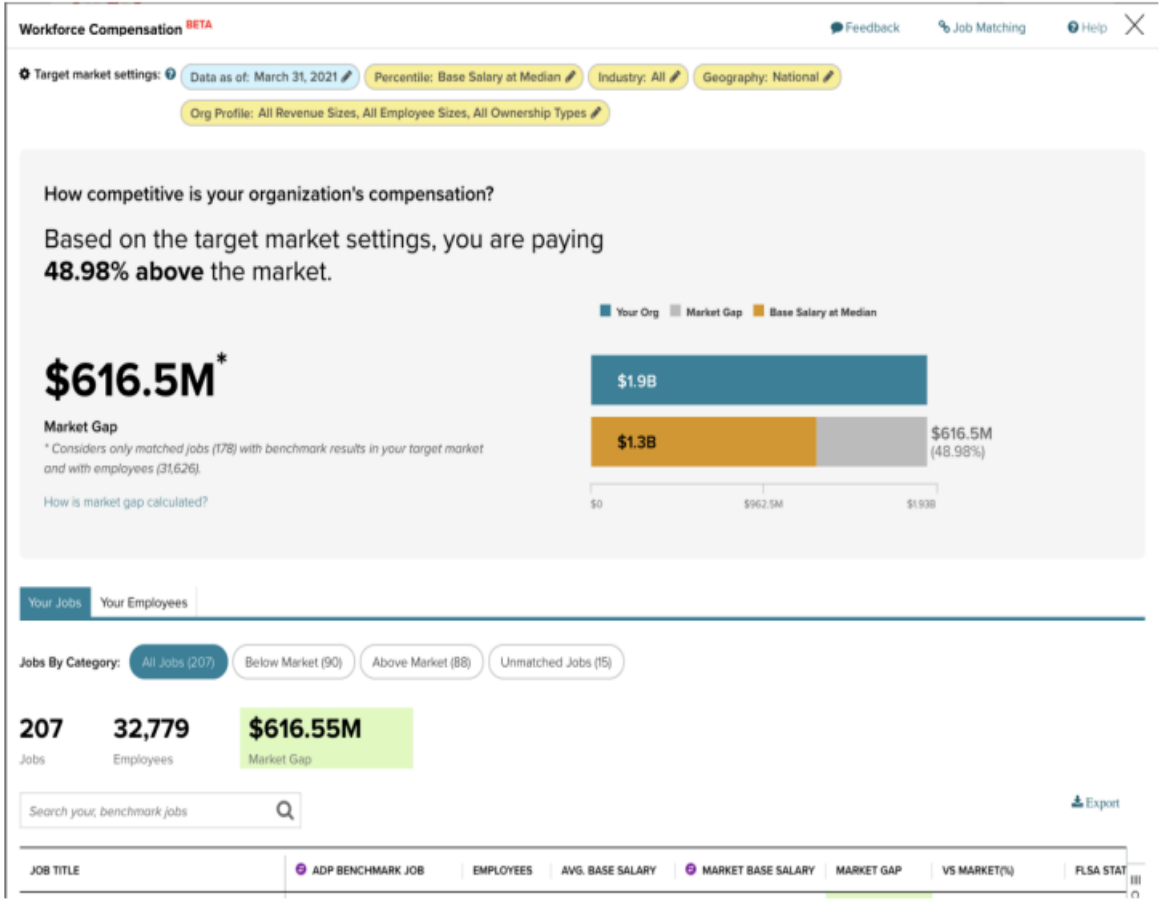
Workforce Compensation Analysis

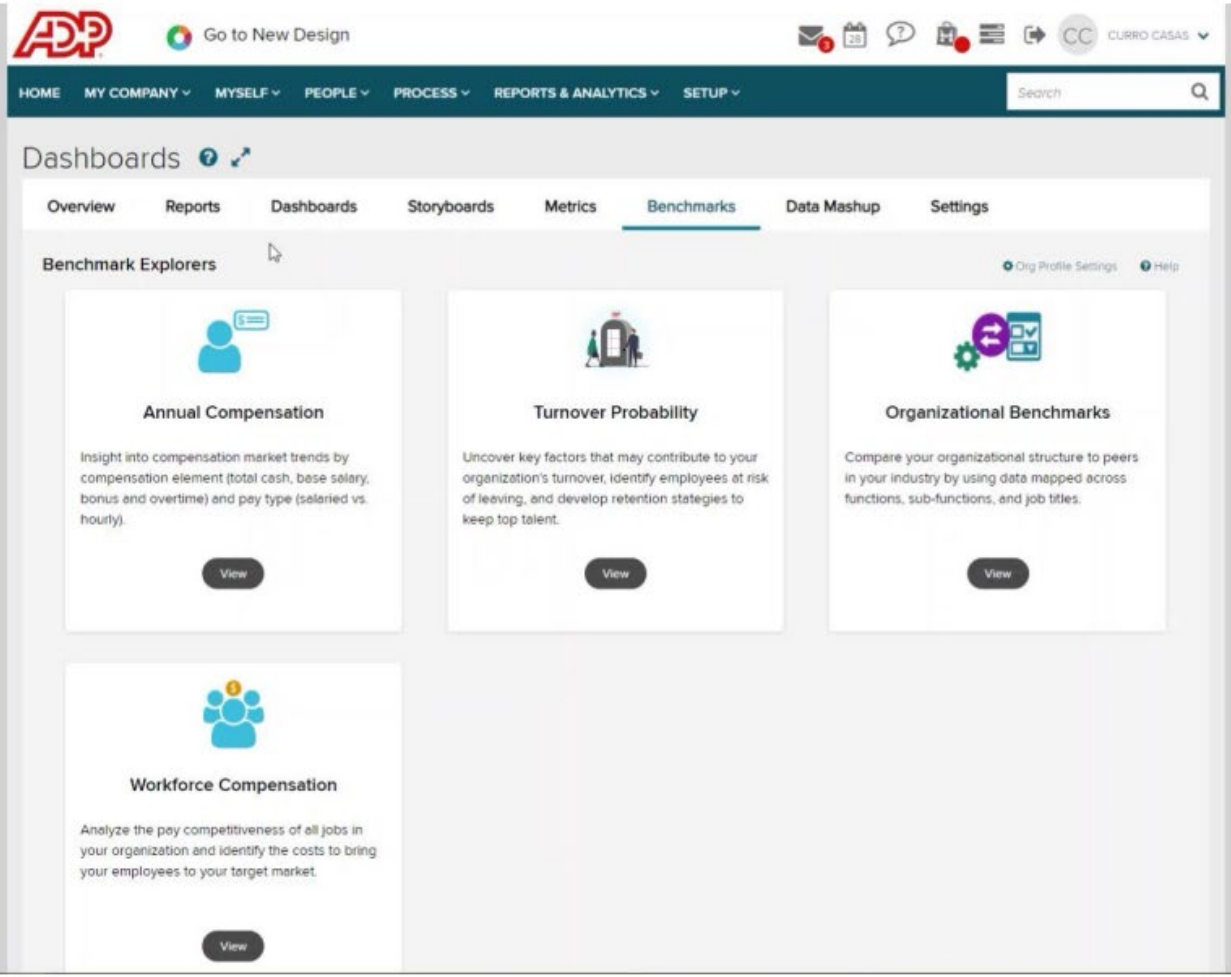
Evaluates the pay competitiveness of all jobs in your organization

- Easily identify jobs where your organization may be over or under paying employees
- Quantify the dollar investment / savings to calibrate your organization's pay with the market
- Match pay to market with greater precision and return hard dollars back to the organization

Enhanced insights

Richer and Deeper Data




Go to New Design
CURRO CASAS
HOME
MY COMPANY
MYSELF
PEOPLE
PROCESS
REPORTS & ANALYTICS
SETUP
Search
Dashboards
Overview
Reports
Dashboards
Storyboards
Metrics
Benchmarks
Data Mashup
Settings
Benchmark Explorers
Org Profile Settings
Help
Annual Compensation
Insight into compensation market trends by compensation element (total cash, base salary, bonus and overtime) and pay type (salaried vs. hourly).
View
Turnover Probability
Uncover key factors that may contribute to your organization's turnover, identify employees at risk of leaving, and develop retention strategies to keep top talent.
View
Organizational Benchmarks
Compare your organizational structure to peers in your industry by using data mapped across functions, sub-functions, and job titles.
View
Workforce Compensation
Analyze the pay competitiveness of all jobs in your organization and identify the costs to bring your employees to your target market.
View

Thank you for joining us!

Any Questions?

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