



Welcome to the Showcase!

## Welcome & Introductions!



**Lori Winters**

Founder & CEO, Thread



**Brandon Gorney**

Partner Success Manager, isolved



# Thread + isolved Showcase

## The Agenda

**10:00-10:10 a.m.**

### Welcome & Introductions

Lori Winters, Thread

Brandon Gorney, isolved

**10:15-10:45 a.m.**

### HCM Maturity Model: Performance, Engagement, Growth

Reannah Gilenson, isolved

**10:45 -11:15 a.m.**

### Thread Client Panel

Michael Bolton, AV-Tech Media Solutions

Aniece Perry, StimLabs

Tricia Houck, Arbor-Nomics

**11:15 a.m.-11:30 a.m.**

### Refreshment Break

**11:30 p.m.-12:30 p.m.**

### isolved People Cloud Demo

Kelli Rico, isolved

**12:30 p.m. - 1:00 p.m.**

### Building High-Performance, High-Culture Companies

Matt Mitcham, Thread

Aaron Clark, Thread

**1:00 p.m.-2:00 p.m.**

### Luncheon – Spend Time With an Expert

**2:00 p.m.-3:00 p.m.**

### HR Trends & Compliance

Scott Mastley, SPHR, Thread

Christina Fiorenza, SPHR, Thread





# Reannah Gilenson

Director, Solution Strategy, isolved

Taking Your Next-Best Step  
Toward HCM Maturity





We understand the challenge

# A complicated and busy world...



Businesses need to find the best, and keep them motivated



HR teams need more time to focus on what's important.



Businesses need to be ready for whatever comes, and HR are on the front line of that plan.



The solution

# The right way to do this

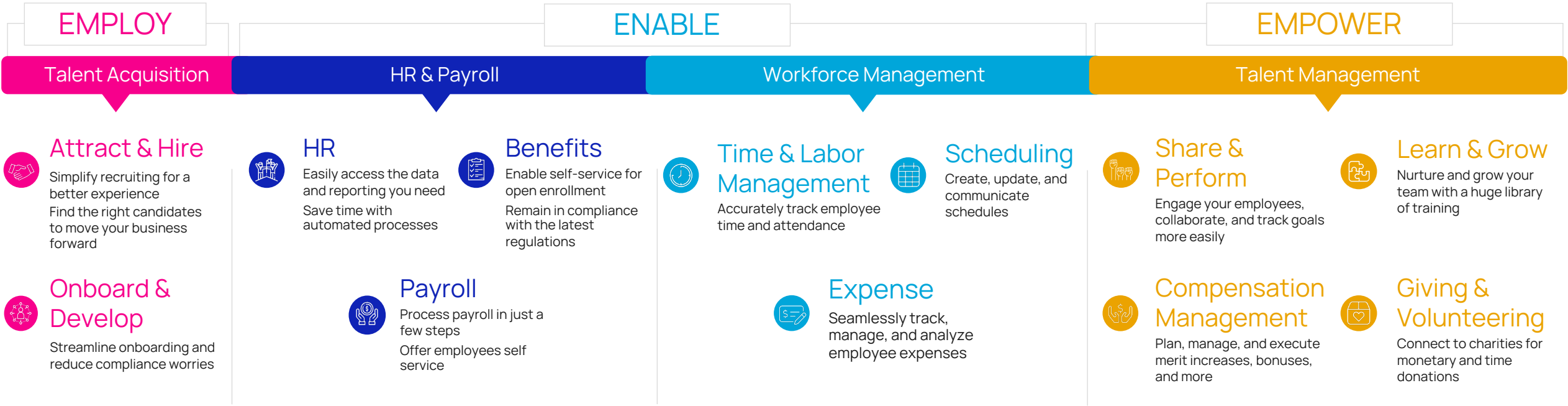
**Successful HR** teams are becoming:

- More responsive and efficient
- Data-driven and strategic
- Better able to engage employees and improve productivity

# isolved People Cloud™ platform

The most comprehensive (broad and deep) yet modular platform available for SMB and midmarket organizations

 Intelligently Connected Platform 




One, consistent Employee Record to deliver better reporting and analytics

Predictive Analytics

Artificial Intelligence

Conversational Virtual Assistant

 Reactive & Adaptive EX

Scalable, Secure and Futureproof Platform

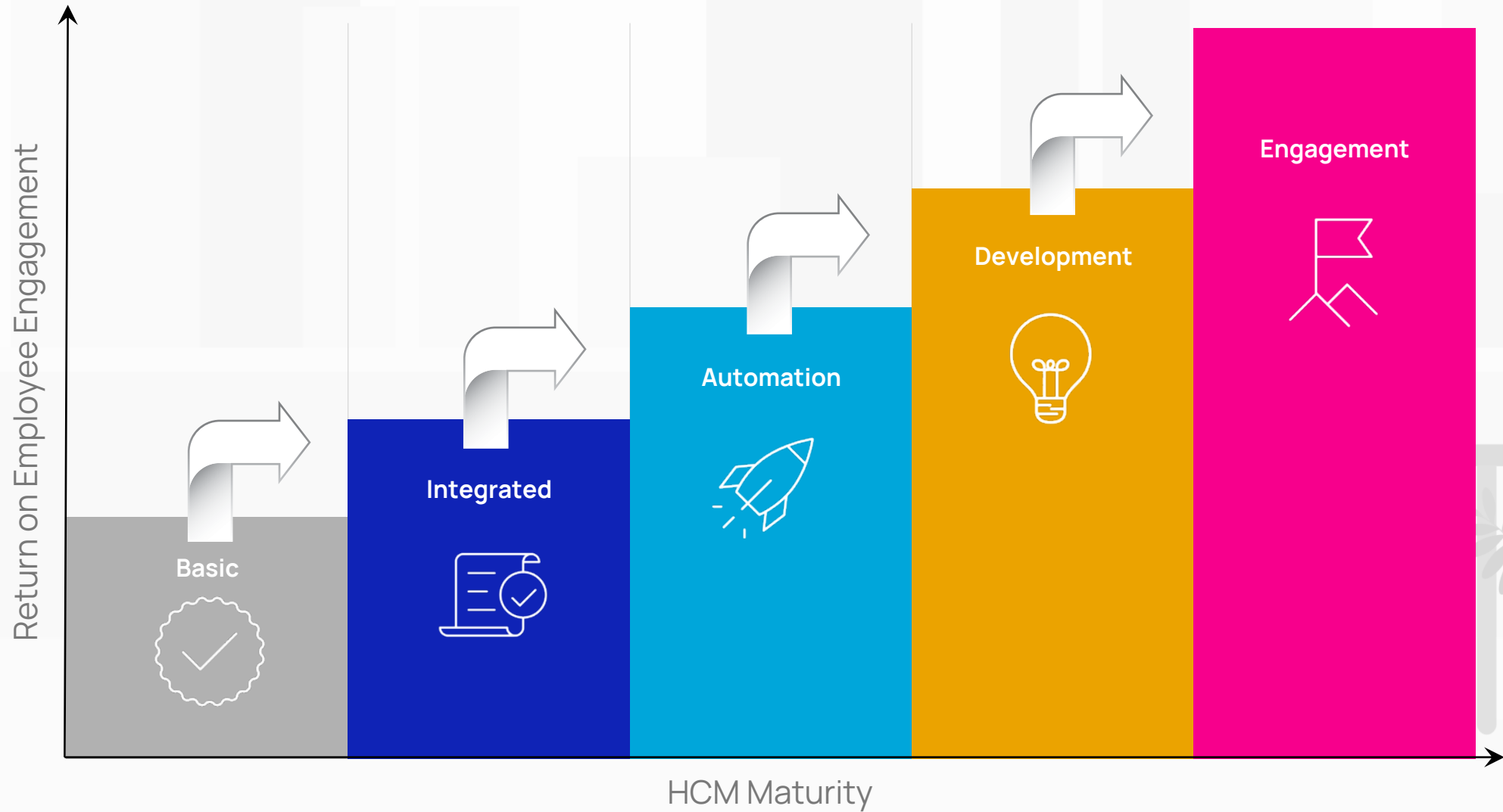
 Microsoft Azure

Benefit Services

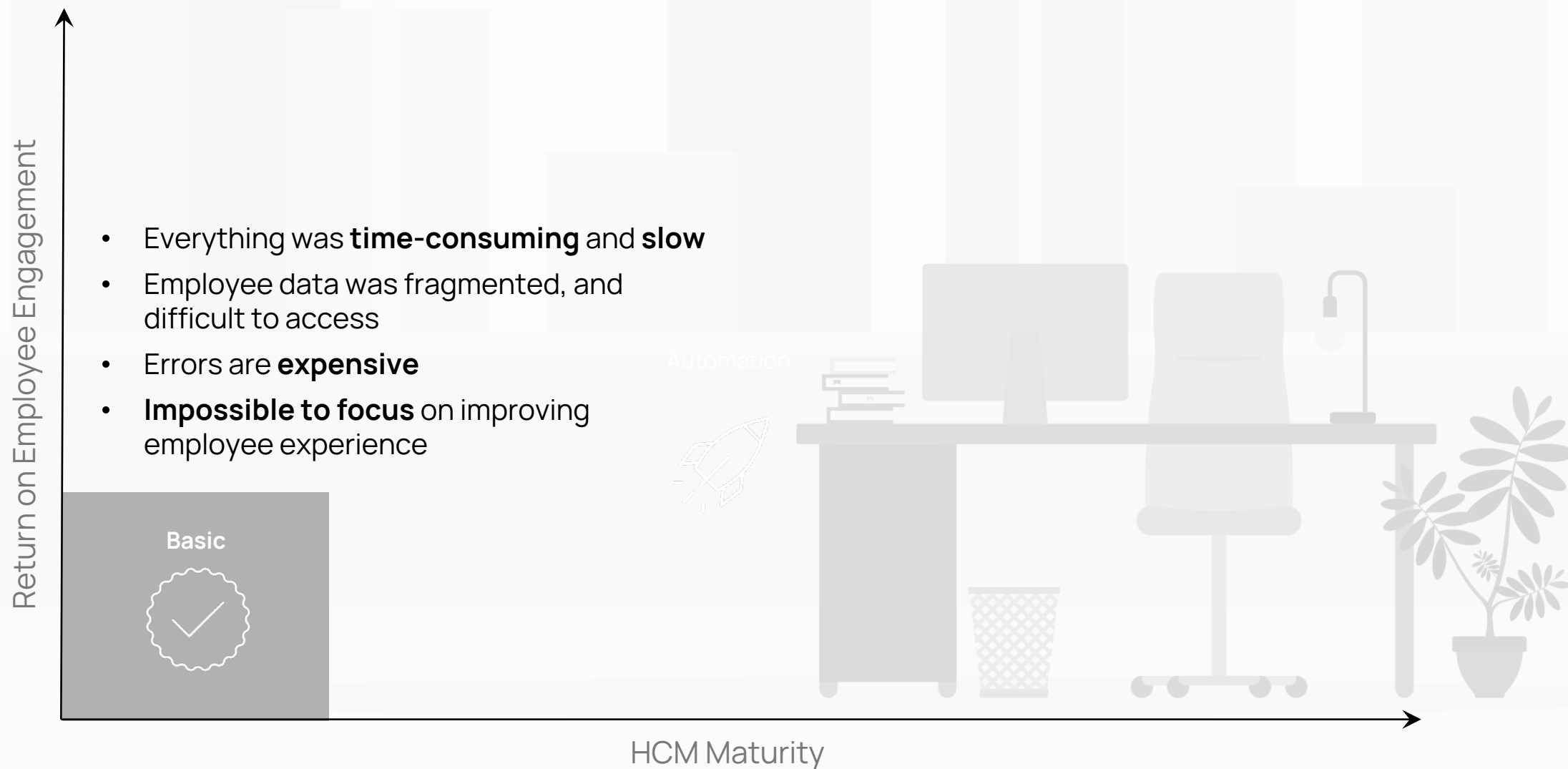
isolved Marketplace

Financial Wellness Services

# HR HCM Maturity Model

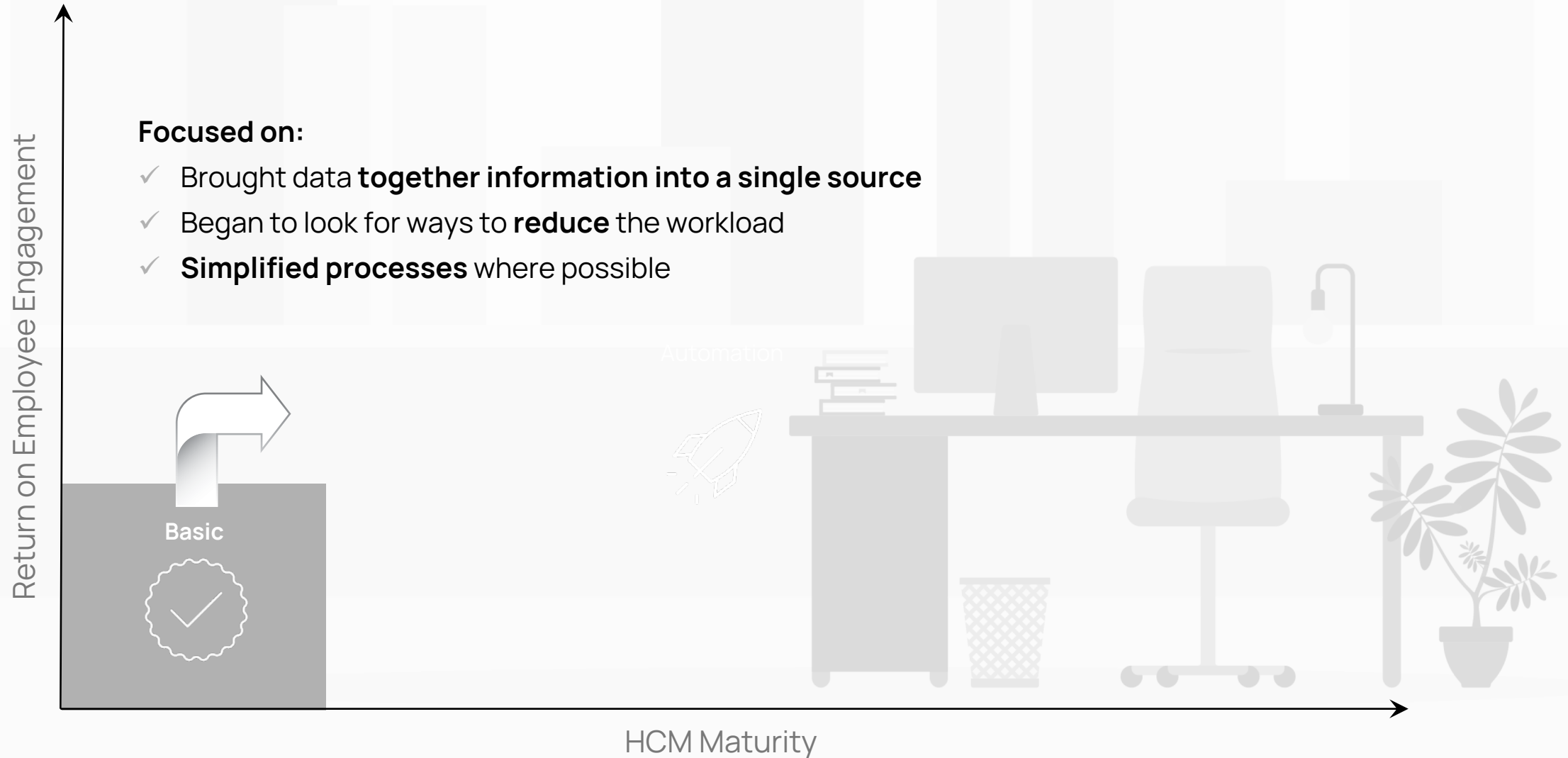


## HR HCM Maturity Model

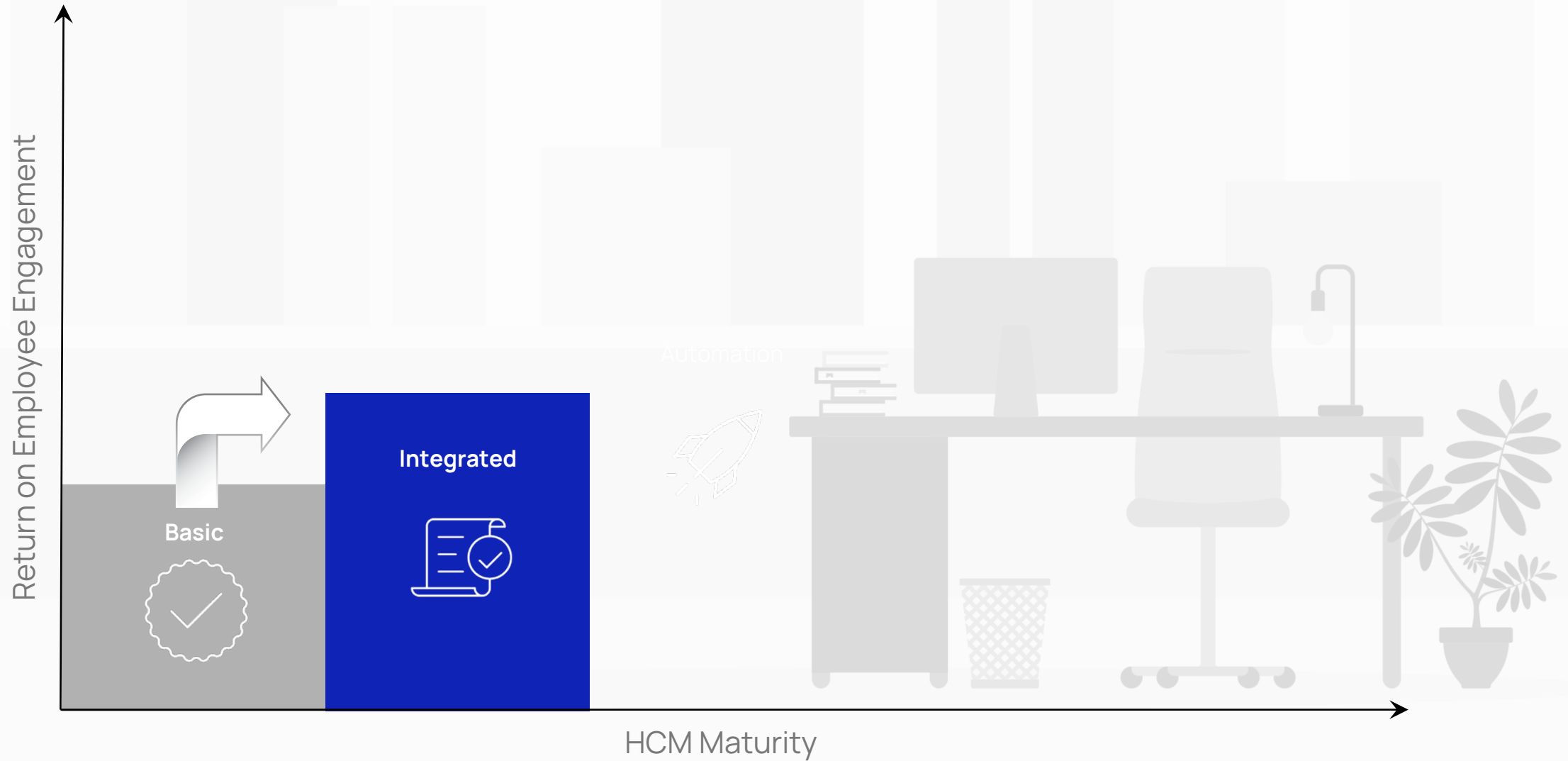




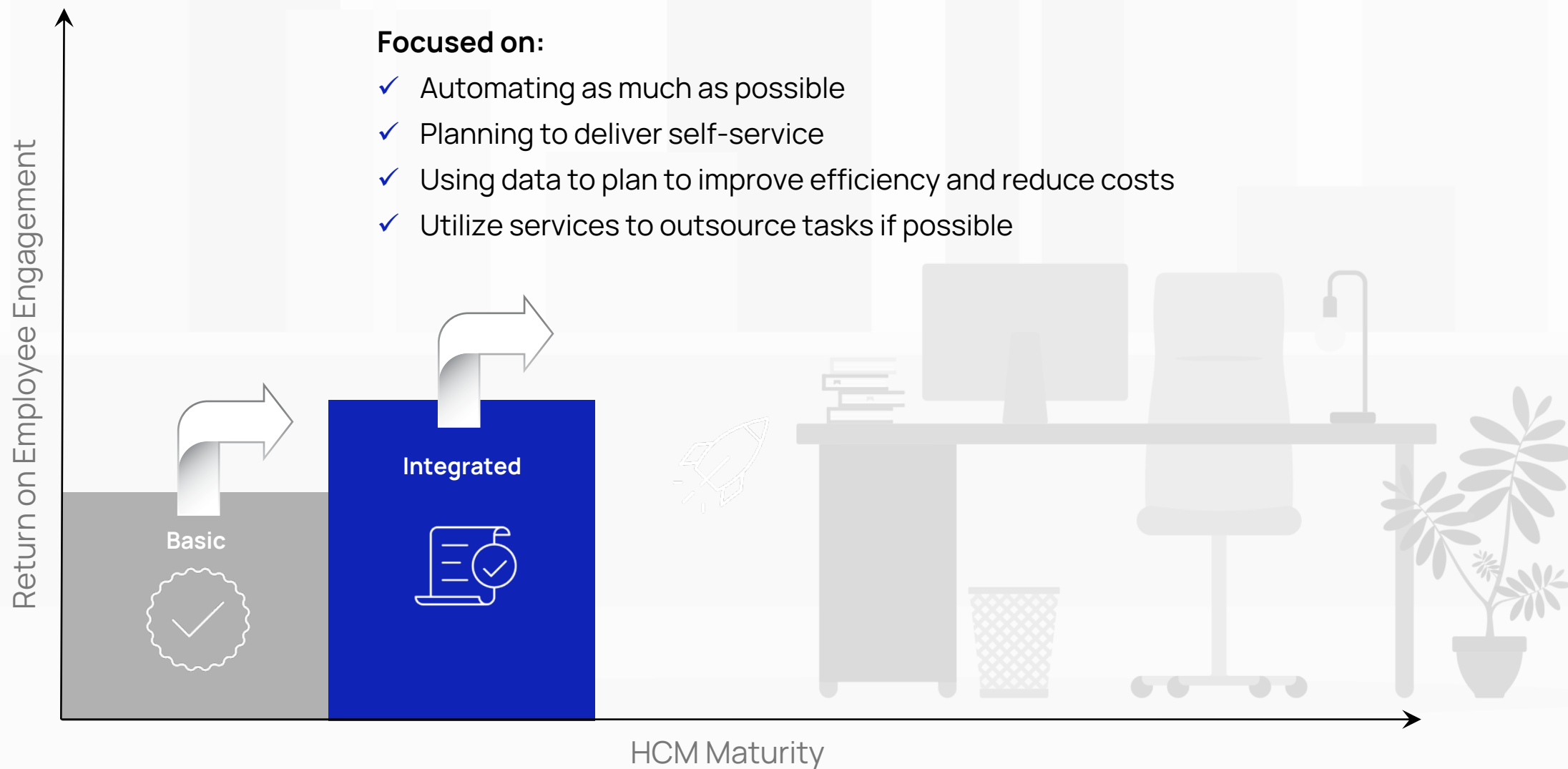
## HR HCM Maturity Model



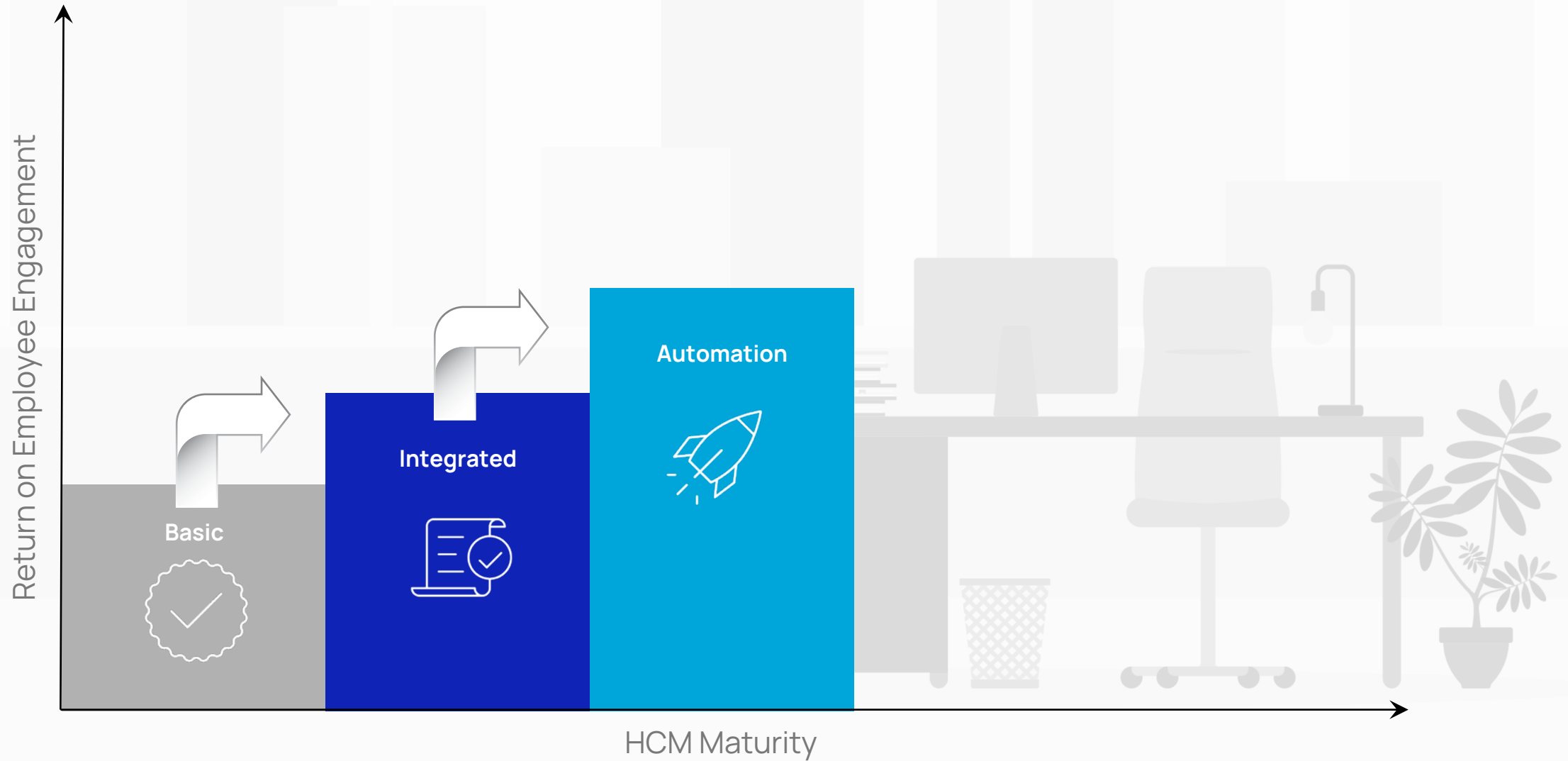
# HR HCM Maturity Model



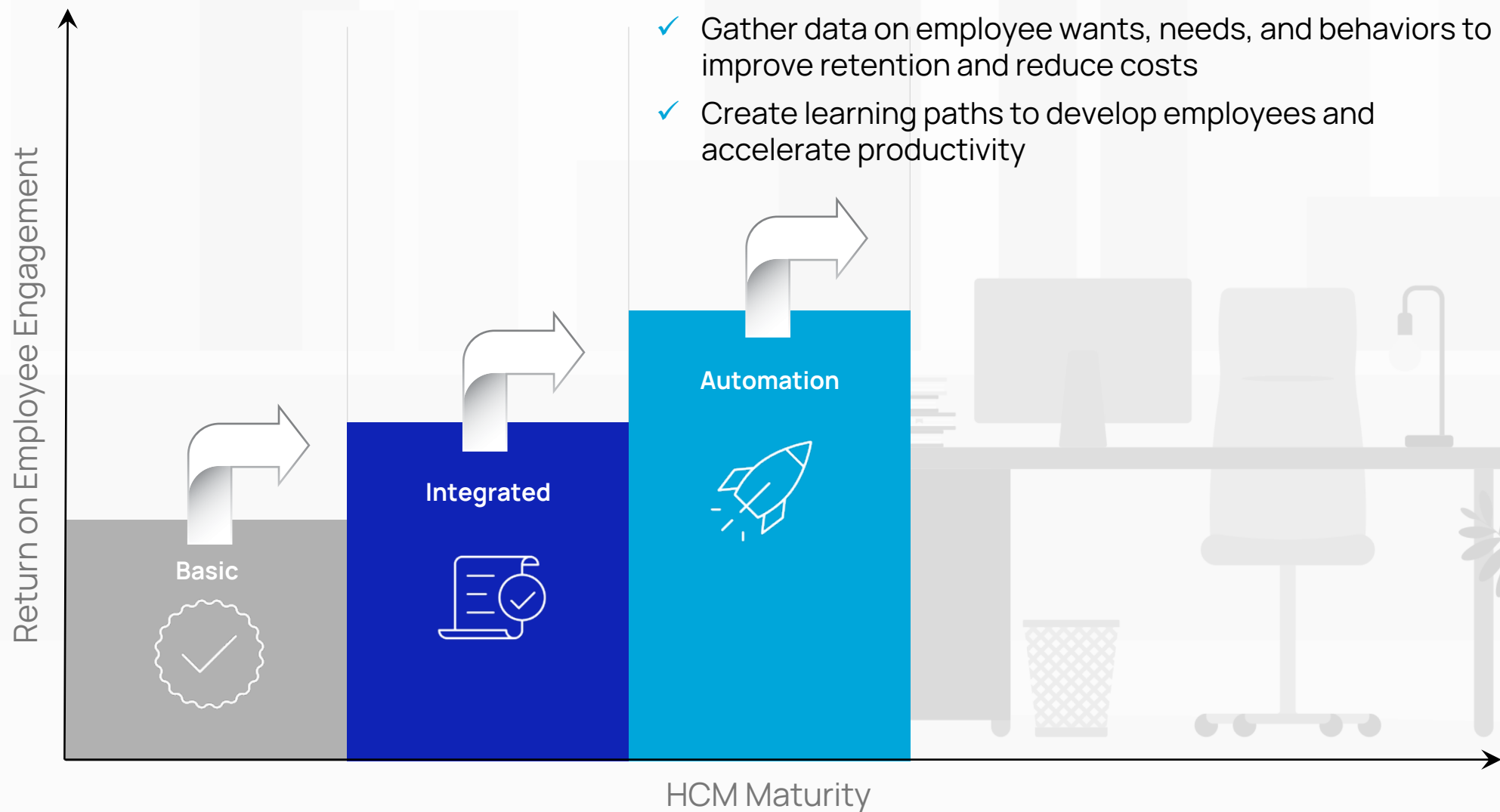
# HR HCM Maturity Model



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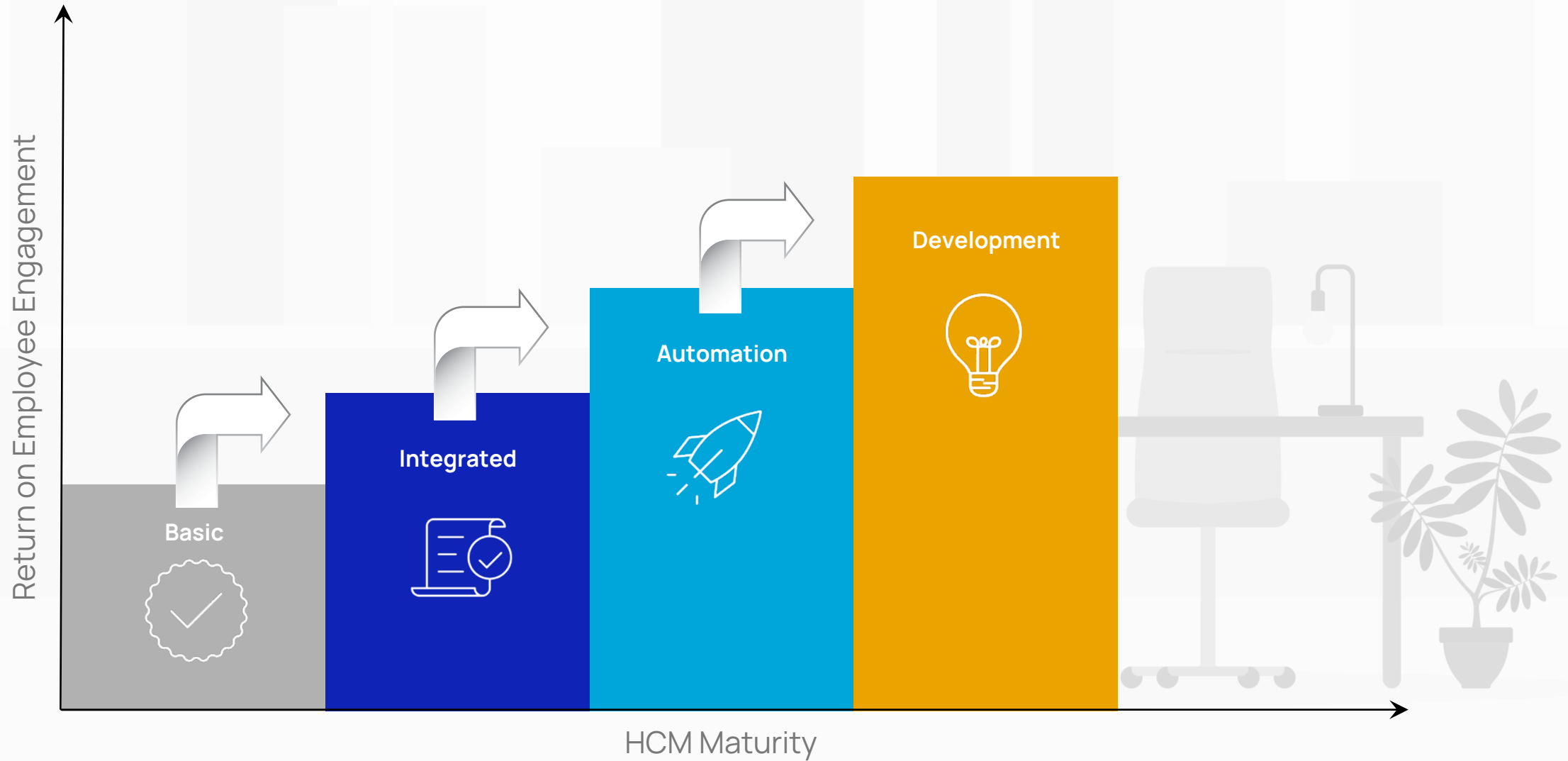


## HR HCM Maturity Model

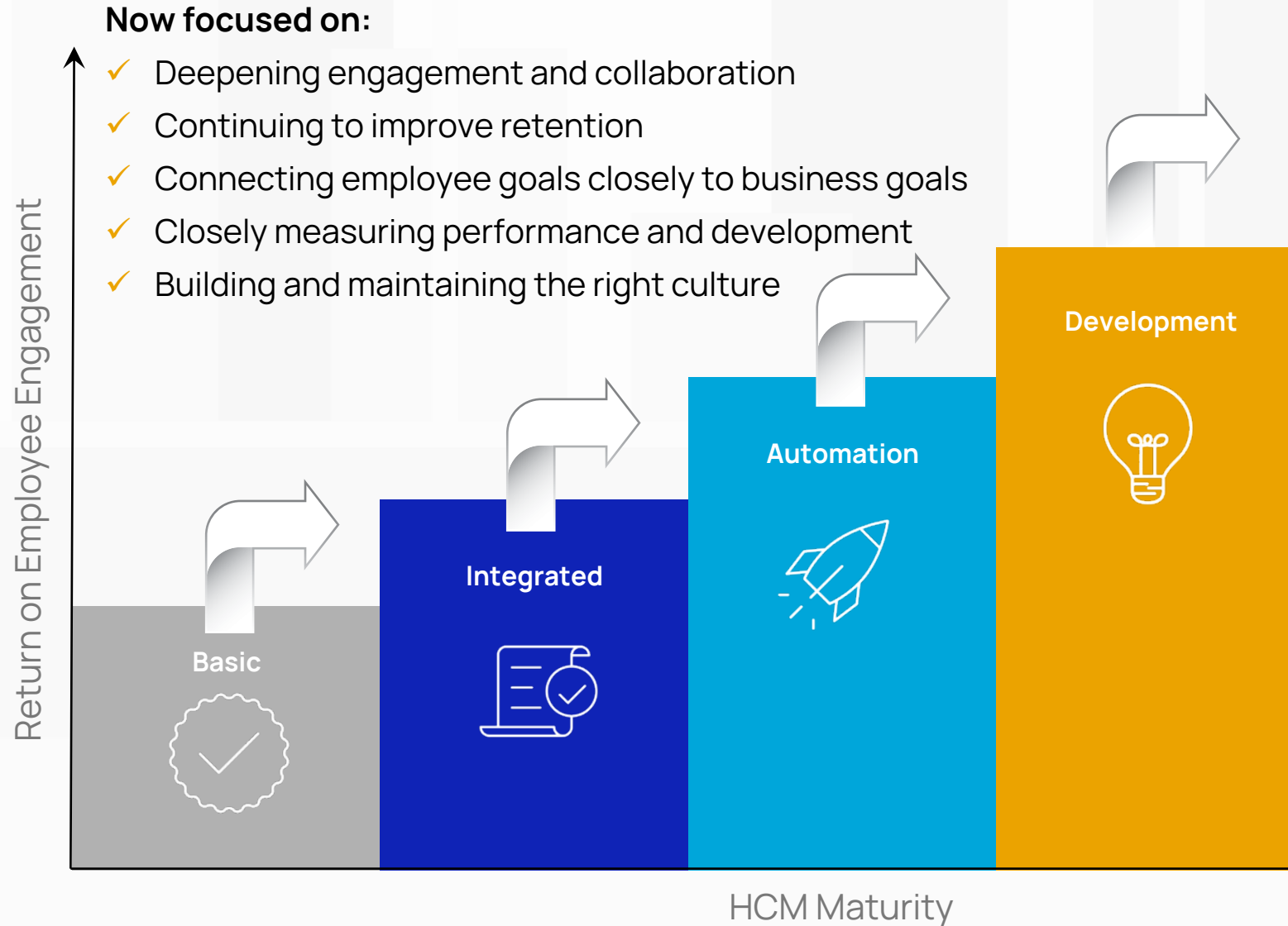




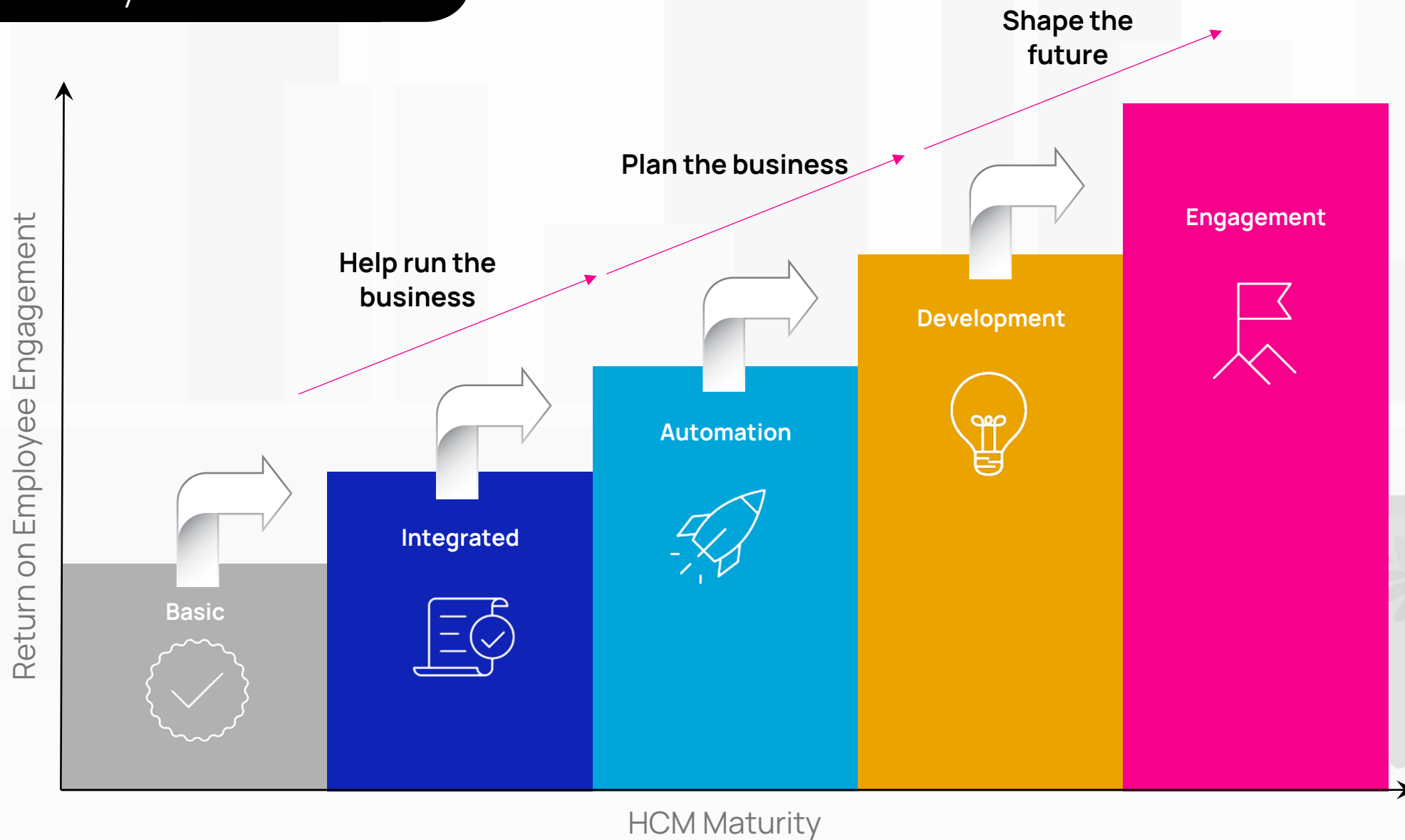
## HR HCM Maturity Model



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# HR HCM Maturity Model



## Thread Client Panel



**Michael Bolton**

Director of Business Services,  
AV-Tech Media Solutions



**Aniece Perry**

HR Manager, StimLabs



**Tricia Houck**

CFO, Arbor-Nomics



# Refreshment Break

Enjoy!





## Explore People Cloud: Live Demo



**Kelli Rico**

VP, Product Management, isolved



## Building High-Performance, High-Culture Companies




**Matt Mitcham**

COO, Thread



**Aaron Clark**

VP, Sales, Thread



**Building a high-culture  
company is intentional  
and purposeful.**

**And it starts with trust.**

It isn't fluff; it's true human  
care - it takes effort.

And it can also be measured  
and supported with the  
right tools, tech, and  
teamwork.

**Vulnerability**

**Positivity**

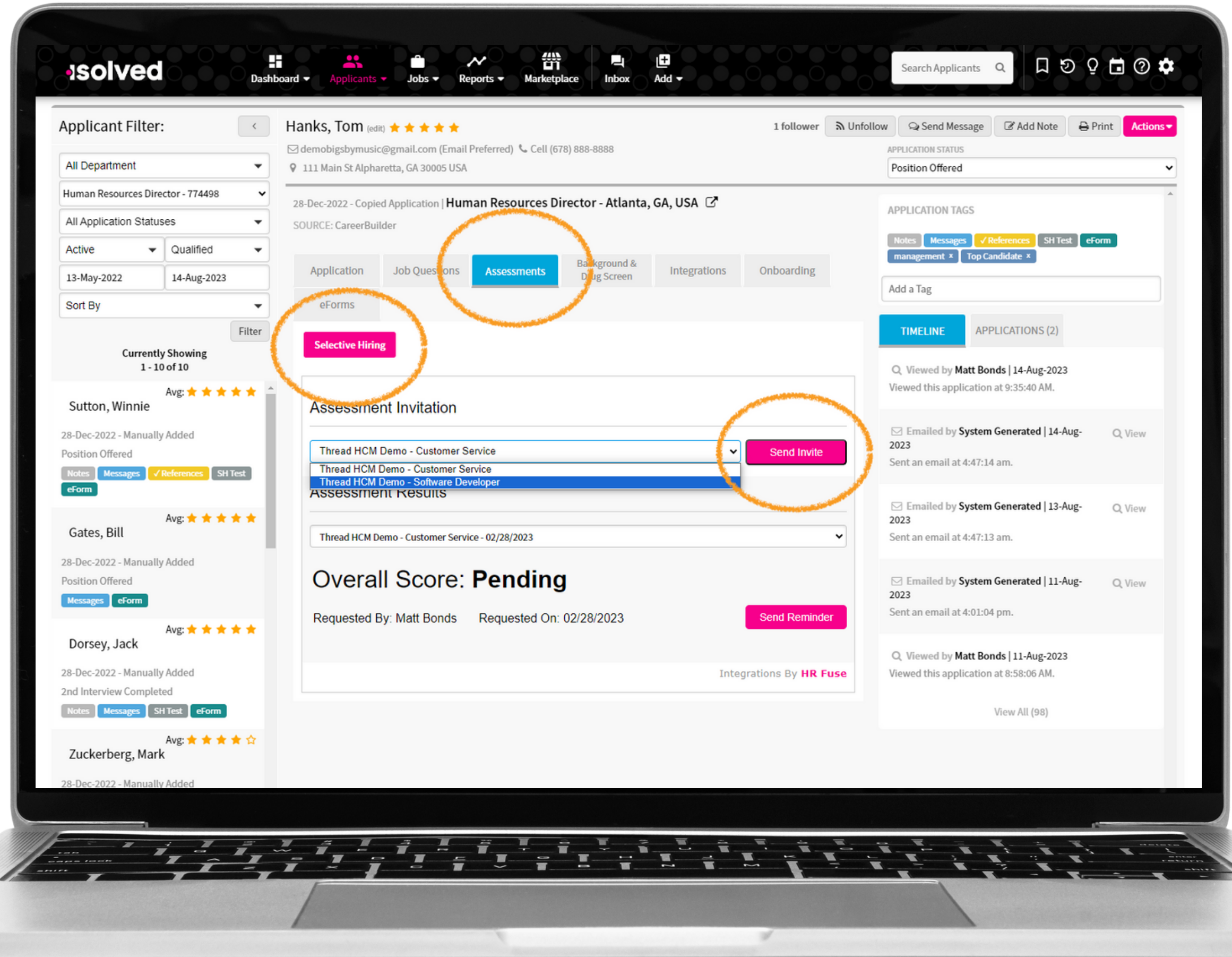
**Consistency**



Increasing self-awareness: staff, managers, leaders

Assessments: PI, StrengthsFinder, etc.

# Vulnerability

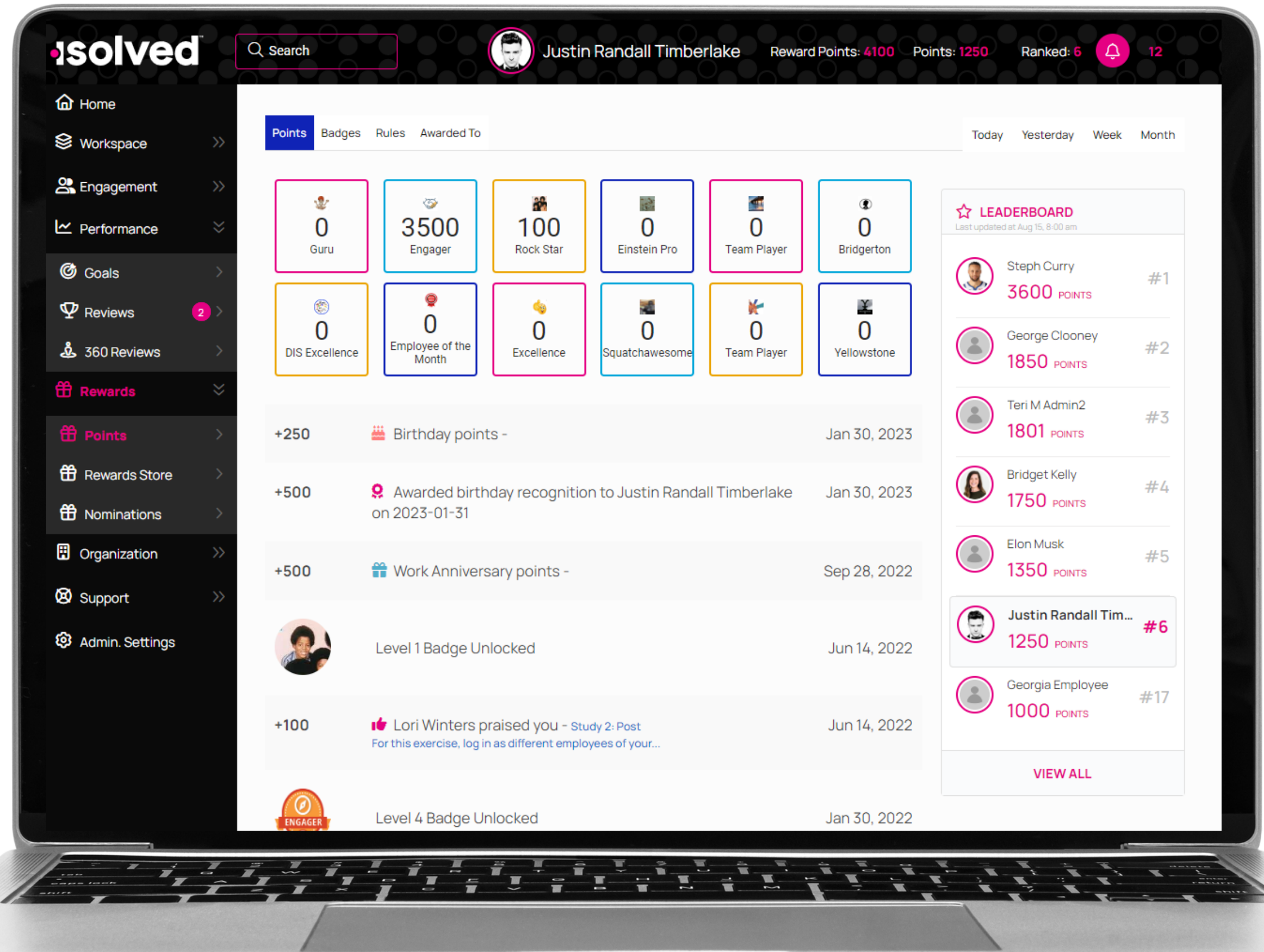




Define it, screen for it.

Set the tone from the start!

# Positivity

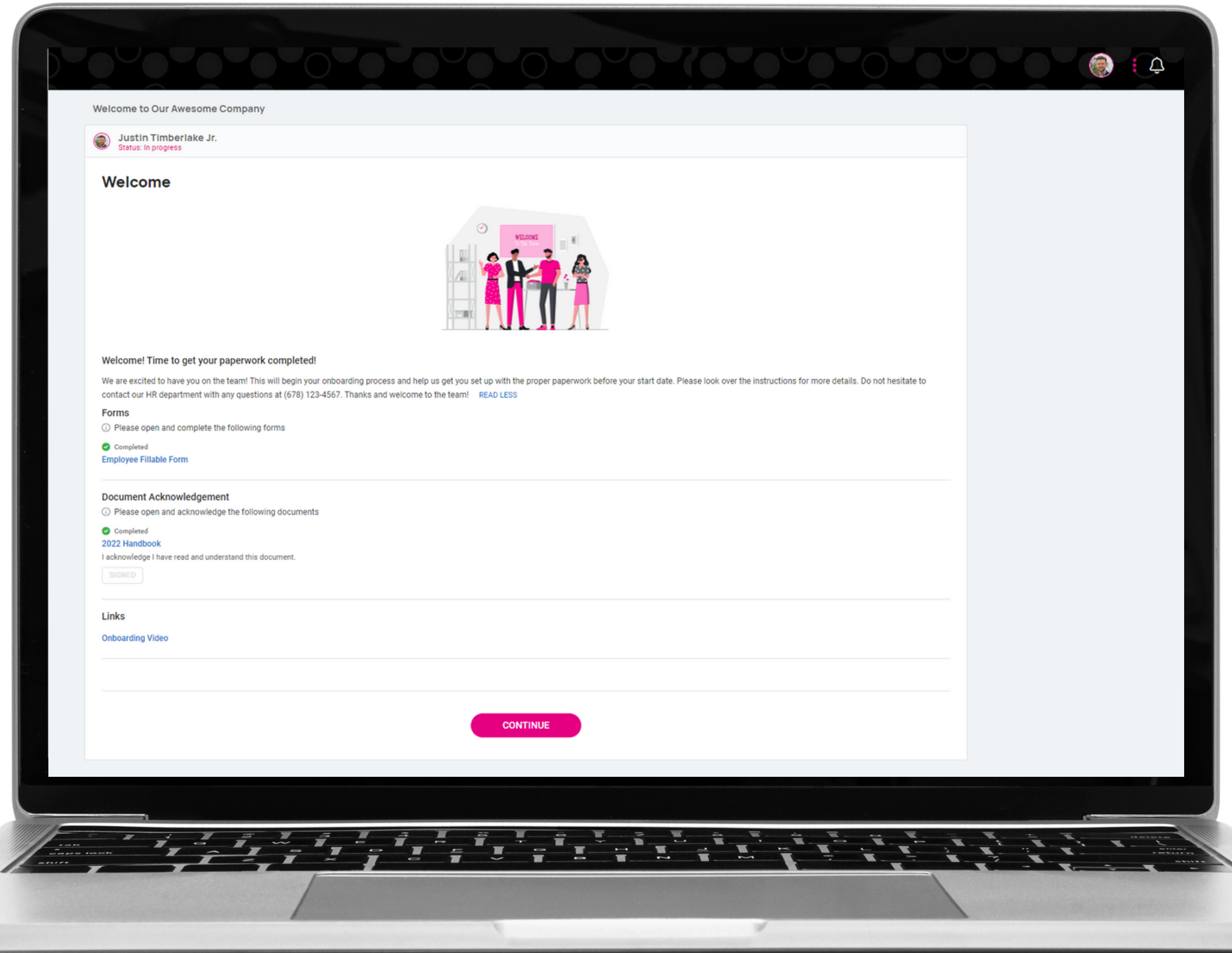





Meeting best practices,  
rhythm, frequency

Benefit plan build,  
project management,  
and more

# Consistency







**Building a high-performing company requires buy-in from the whole team.**

Getting everyone on board requires transparency, accountability and clearly defined metrics tied to company achievements.

**Define Success**

**Set Goals**

**Measure efforts**

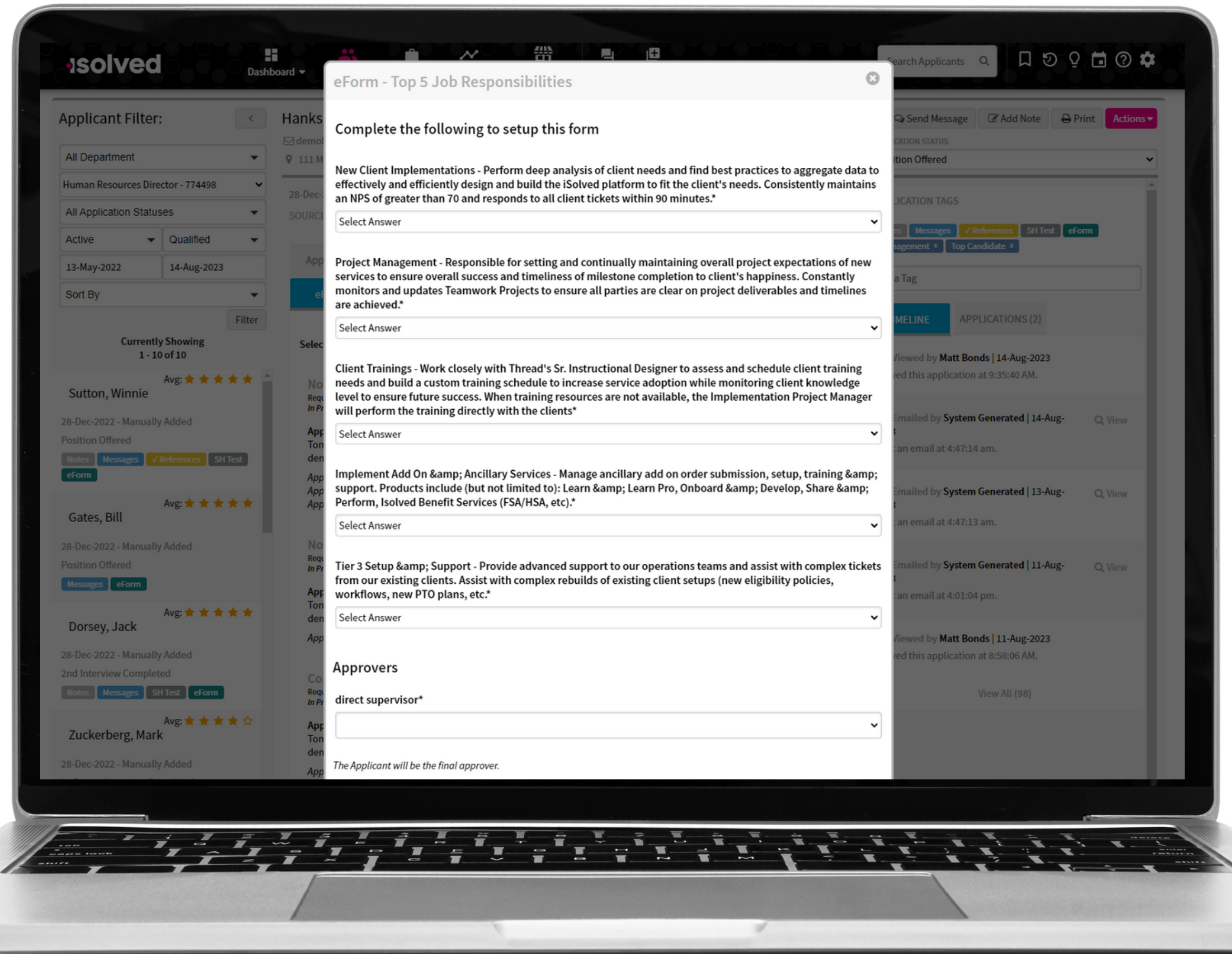


What are the company goals?

Tie the job profile to company goals

Together, come up with SMART goals that connect the employee's work to the company success

# Define Success & Set Goals



**iSolved** Dashboard

**Applicant Filter:**

- All Department
- Human Resources Director - 774498
- All Application Statuses
- Active
- Qualified
- 13-May-2022
- 14-Aug-2023
- Sort By

Currently Showing 1 - 10 of 10

**Sutton, Winnie** Avg: ★★★★★  
28-Dec-2022 - Manually Added  
Position Offered  
Notes Messages References SH Test eForm

**Gates, Bill** Avg: ★★★★★  
28-Dec-2022 - Manually Added  
Position Offered  
Messages eForm

**Dorsey, Jack** Avg: ★★★★★  
28-Dec-2022 - Manually Added  
2nd Interview Completed  
Notes Messages SH Test eForm

**Zuckerberg, Mark** Avg: ★★★★★☆  
28-Dec-2022 - Manually Added

**eForm - Top 5 Job Responsibilities**

Complete the following to setup this form

New Client Implementations - Perform deep analysis of client needs and find best practices to aggregate data to effectively and efficiently design and build the iSolved platform to fit the client's needs. Consistently maintains an NPS of greater than 70 and responds to all client tickets within 90 minutes.\*

Select Answer

Project Management - Responsible for setting and continually maintaining overall project expectations of new services to ensure overall success and timeliness of milestone completion to client's happiness. Constantly monitors and updates Teamwork Projects to ensure all parties are clear on project deliverables and timelines are achieved.\*

Select Answer

Client Trainings - Work closely with Thread's Sr. Instructional Designer to assess and schedule client training needs and build a custom training schedule to increase service adoption while monitoring client knowledge level to ensure future success. When training resources are not available, the Implementation Project Manager will perform the training directly with the clients\*

Select Answer

Implement Add On & Ancillary Services - Manage ancillary add on order submission, setup, training & support. Products include (but not limited to): Learn & Learn Pro, Onboard & Develop, Share & Perform, Isolved Benefit Services (FSA/HSA, etc).\*

Select Answer

Tier 3 Setup & Support - Provide advanced support to our operations teams and assist with complex tickets from our existing clients. Assist with complex rebuilds of existing client setups (new eligibility policies, workflows, new PTO plans, etc).\*

Select Answer

**Approvers**

direct supervisor\*

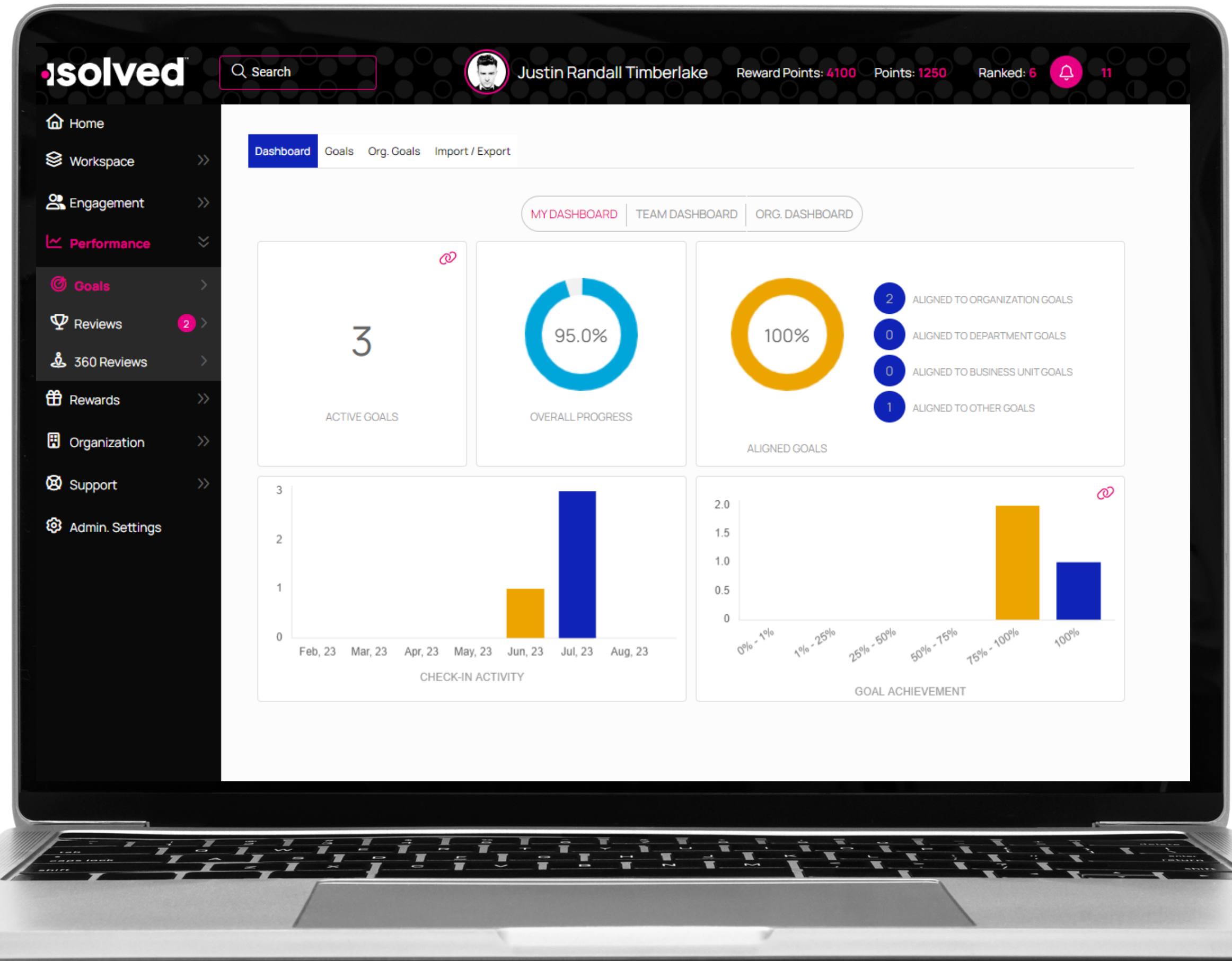
The Applicant will be the final approver.



Metrics, scorecard,  
reviewed and discussed  
regularly

Reward and revise  
accordingly

# Measure Efforts





A group of people are sitting at a table outdoors, smiling and eating. The background is filled with colorful string lights and festive decorations, creating a warm and social atmosphere. The text "Let's Eat!" is overlaid in the center of the image.

# Let's Eat!

## HR Trends & Compliance



**Scott Mastley, SPHR**  
CHRO



**Christina Fiorenza, SPHR**  
Senior HR Advisor, Thread







# Exempt or Non-Exempt

Salaried or Not? ✓

Salaried Non-Exempt: Just Don't ✓

Independent Contractor Distinction ✓

Converting Salaried to Hourly ✓



# People Like to Get Paid

Timekeeping and Tracking ✓

Final Pay Regulations ✓

No Auto Lunch Deductions ✓

Minimum Wage ✓





# Keep That Handbook Updated

Conduct a Thorough Review ✓

Monitor NLRB ✓

Answer FAQs ✓

Establish Expectations ✓

Support Managers ✓

Signed Acknowledgments ✓



# Know Those State Laws

Overtime and Final Pay ✓

File Access ✓


Restrictive Agreements ✓

Applications ✓

Jury Duty and Voting ✓

Leave Regulations ✓

And More ✓



# Train Your Team

(Supervisors & Managers)

Interviewing and Hiring ✓

Performance Management ✓

Fundamentals of Employment Law ✓

Managing the Termination Process ✓

Claims Management ✓

Harassment and Discrimination ✓

Diversity, Equity, and Inclusion ✓





# Get Those I-9s Right

Is a Virtual Review Still OK? 

Using E-Verify 

New I-9 Form 

Complete an Audit 



# Use isolved for Efficiency

Applicant Tracking and Recruiting ✓

Digital Onboarding and File Storage ✓

Learning Management ✓

Performance Management ✓

Predictive Analytics ✓

Workflows and Time ✓

Managed Payroll ✓



# Standout with Onboarding

Everything Is Ready When They Start ✓

Orientation Mapped Out With Goals ✓

Growth Plan Explained ✓

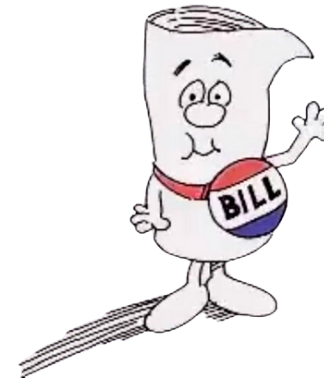
Share Culture and Team ✓

Provide Resources ✓

Check-In and Get Feedback ✓



# Be Prepared



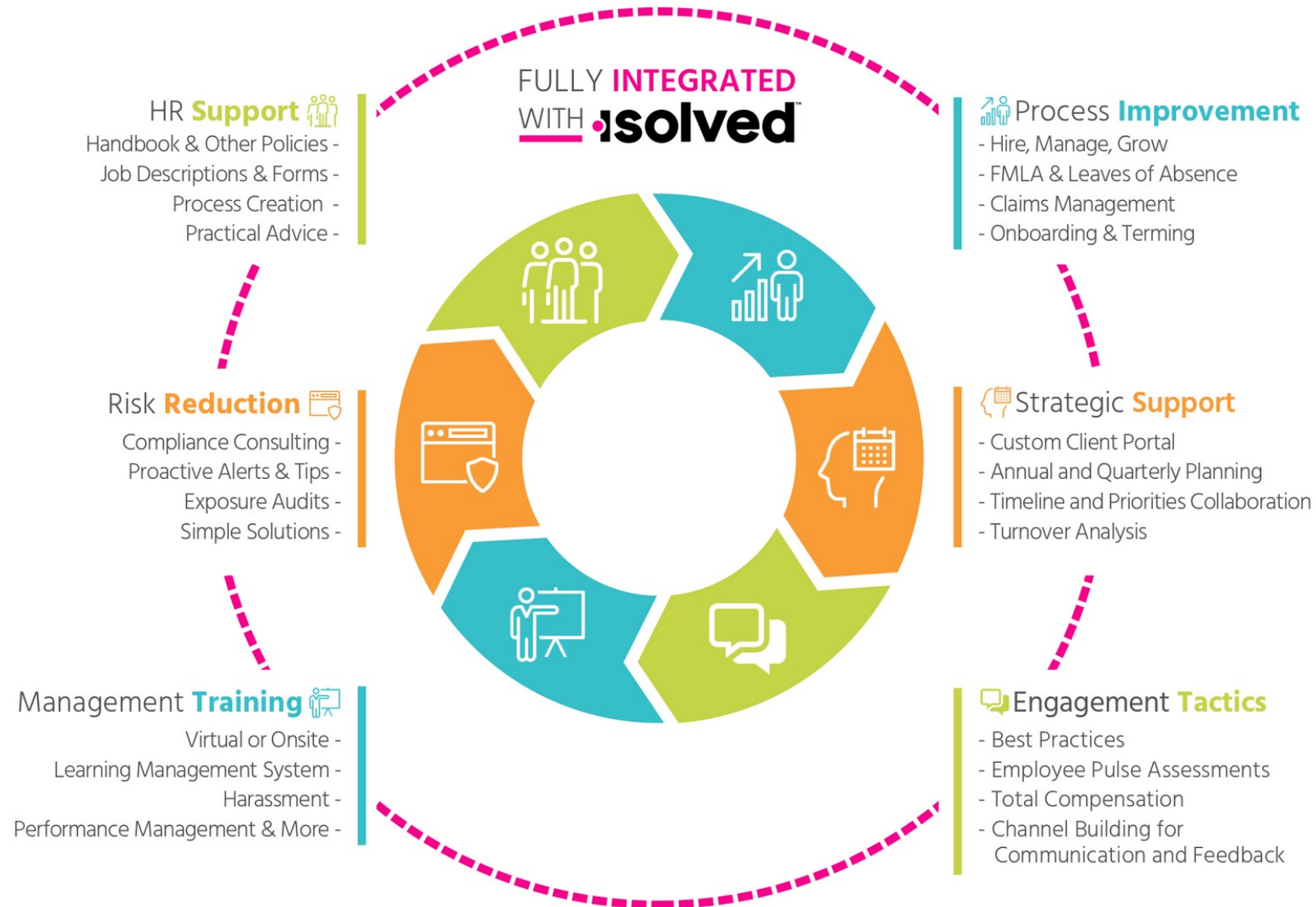
A Bill Is Only A Bill... ✓

Be Ready ✓

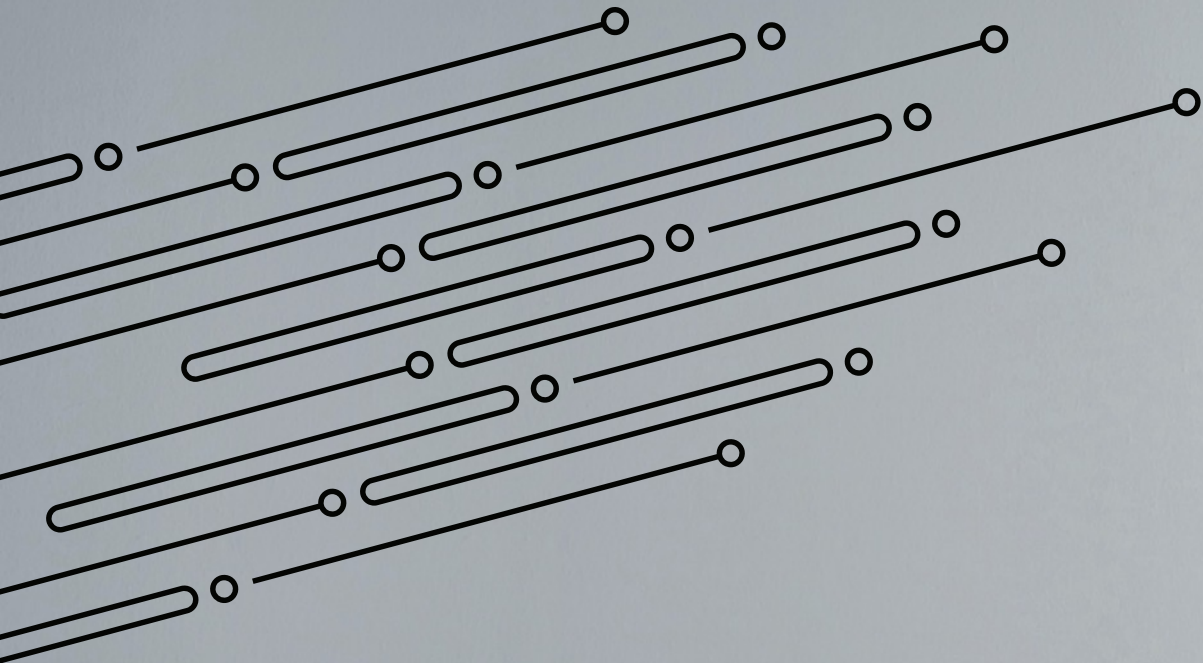
Collaborate With Your HR Advisor ✓

Contingency Planning ✓

# Work with Proactive Professionals







Thank you!

