

CPA FIRM GETS NEWFOUND SATISFACTION IN THEIR CURRENT PEO WITH ADVICEHR'S CONSULTING.

Danielle is the COO of a reputable CPA firm in Long Island, NY. They had high insurance rates, felt payroll and HR were time consuming. With twenty employees they also needed resources to better align employees with job duties and streamline workflows. They brought in a PEO to improve their situation.

Four years into the PEO relationship with several ongoing issues they were unsure if their PEO was a good fit for their business. They questioned the HR support, which led them to get HR advice on their own. Certain payroll and time-tracking issues made what was supposed to be a simpler process into a time-consuming one every pay period. After a series of increases every year, they weren't sure if pricing was as compelling as when they started either. Part of the issue was transparency. **"We saw all our reports in one lump number and didn't understand what went into them."**

After connecting with AdviceHR, we ran our underwriting process with several PEOs that could deliver on their needs. Danielle mentioned, **"The process was explained upfront, expectations were set, and everything needed for the project was easy to get. Communication was great and questions were answered right away."**

We reviewed multiple options with the entire C-suite and it was enlightening. **"AdviceHR was able to break the costs out and pull apart fees that were all rolled up. Through their experience, they translated the language in a way we could understand."** **"There were multiple profit centers we were unaware of..."** The CEO was stunned by the extra money he was paying in taxes and other areas the PEO was pocketing.

Their AdviceHR advisor then shared data received about their organization's healthcare usage. Scores showed serious medical conditions were being treated, which complicated the situation. Seeing heavy usage but only a moderate renewal increase from their current PEO, we speculated the PEO was offsetting a high health insurance increase by pulling funds from other buckets of revenue. We knew this was possible considering AdviceHR's knowledge of their current PEO.

Seeing their competitive options, it was a risk staying or leaving. **"Based on numbers on paper, it would have made sense to switch."** said Danielle. Leaving meant their payroll and HR issues would have been solved while saving money. However, the viable alternatives might not have handled the large claims as well if they continued. Staying with their current PEO for another year meant they had to deal with some issues but no possibility of a high renewal for another 12 months. Considering the situation, the AdviceHR advisor explained they should stay with their PEO unless the issues were bad enough to warrant the risk.



“Knowing how the broker model works, I knew the only way they made money was if we switched. But still, they recommended we stay with our current PEO...There was a high level of trust that was established and advice was given that was better for our business regardless of how it worked out for AdviceHR.”

The decision was made to stay put and have their AdviceHR advisor assist with the renewal. Danielle previously tried to get a price reduction, especially considering the issues, and had no success. Within two days their AdviceHR advisor negotiated a 35% reduction of their admin costs and assisted in resolving some of the operational issues. Danielle and her team was pleased and closed out the project with one last statement.

“If there was one thing that exceeded my expectation it was the confidence and knowledge of AdviceHR. We learned more throughout our time with them about our PEO than we might have learned in four years working with our PEO directly.”

