

# PEO Insider®

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## THE PEO BUSINESS MODEL So Many Possibilities...

### ALSO INSIDE:

Keys to Client Loyalty and Satisfaction

The Evolving PEO Sales Process

Workers' Compensation for the Start-Up PEO

PEOPLEASE

# Excelling in Risk Management to Serve the Trucking and Transportation Niche



Samuel F. Rossa

PEOPLEASE was formed more than 20 years ago in beautiful Charleston, South Carolina, with an exclusive focus on the trucking and transportation industry, a complex regulatory sector requiring substantial risk management expertise.

Our company is a full-service PEO serving mid-sized trucking and transportation companies. Our footprint is nationwide, with nearly \$1 billion in payroll, payroll taxes,

and insurance premiums and we provide our clients cost-effective payroll, healthcare, workers' compensation, and human resources solutions. Our unique field and centralized model allow for the efficiency of scale at core service centers in South Carolina and Indiana, which provide a large field-based support group in business development, safety, and human resources to be closer to our client partners.

Because the industry we service has the potential to be much higher risk due to the driving exposure, client engagement is critical to our success in this area.

PEOPLEASE is also a community-minded and caring company. Our P.E.T.S (PEOPLEASE Expert Trucking Solutions) program contributes to local charities of each new client partners' choice when joining the PEOPLEASE family. Over the past year, we have participated and contributed to the Ice Bucket Challenge, Naval Special Warfare Kids, The Rosie Network, Masters for Max (Juvenile Diabetes Research Foundation), the Dragon Boat for Cancer Survivors, and the Special Operations Warrior Foundation.

An exclusive and focused group of brokers and agents plays an integral part in our business development engine, which has consistently seen double-digit top-line growth. Our internal sales support team aligns with our brokers and agents to maintain a high closure rate and an easy-to-engage, customer-centric onboarding and implementation process. We recently rolled out an electronic underwriting interface, which will improve speed and efficiency in the initial approval process.

Because of our specialized client base of trucking and transportation companies, we offer a best-in-class workers' compensation program with exceptional and unique levels of service. Our expert risk management professionals engage with our client partners from the prospect stage through the onboarding process, while providing expert guidance to client partners through field safety visits and training. Because the industry we service has the potential to be much higher risk due to the driving exposure, client engagement is critical to our success in this area. Our team expertly manages claims intake, return-to-work, and ultimately claims closure.

Most critical to maintaining safe workplaces for our client partners, our expert risk management team realizes that workers' compensation coverage and meeting Occupational Safety and Health Administration (OSHA) standards can be a daunting task for business owners. With new laws and increasing employer regulations, the risk of compliance and liability lawsuits has risen. We work to minimize hazardous exposure, reduce employee injuries, and help improve and enhance a safety culture in our client partners' workplaces. We do this by providing workers' compensation claims management, safety and injury prevention training, video training, and regional field safety experts. Additionally, with our pay-as-you-go workers' compensation approach, client partners are able to protect cash flow by avoiding large up-front collateral deposits as well as additional year-end payments by paying on actual payroll each payroll cycle, rather than using estimates subject to audit.

We bundle safety and risk, payroll, human resources, and employee benefits management into a unique value proposition for the small and medium-sized firms that move America. We handle the administrative functions, including tax compliance, filing returns,



wage garnishments, payroll check processing, benefits administration, and termination procedures. Handling these tasks not only gives business owners back their valuable time, but also provides assurance that often-costly mistakes in these areas are avoided.

Our PEO has more than 20 years of experience in providing critical solutions in today's ever-changing environment of increased legislation and compliance. To further distinguish ourselves from other solution providers dedicated to the trucking and transportation industry, we have invested in:

- Cloud-based technology incorporating customer relationship management (CRM) software and enterprise resource planning (ERP) with:
  - Automated tax-filing software;
  - Automated HR, payroll, and tax management solutions; and
  - A best-in-class human resources information system.
- Centralized and field-based client services and human resources, including handbooks, Affordable Care Act (ACA) solutions, background/drug testing solutions, and employment practices liability insurance (EPLI); and
- Centralized and field-based risk management solutions, including 24/seven nurse triage for claim intake, California

Medical Provider Networks (MPN), and nationwide enhanced pharmaceutical and bill review.

PEOPLEASE has partnered with hundreds of mid-sized trucking and logistics companies in 45 states. Our average client partner size is roughly 50 employees, with a range of 15 to 1,000, and a geographical footprint that aligns with the way America moves product from port to door.

Another final point of distinction is our industry outreach allowing for a collaborative exchange of expert topics such as the ACA, 401(k), independent contractors, safety and risk, and recruiting and retention in the form of both expert webinars and regional events such as the Safety Forum we held in Chicago this past June, which was open to the public. All of these events are publicized on our website well in advance. The expertise PEOPLEASE provides along the way, and the care and concern taken for each and every one of our client partners, holds to the values that have shaped our company into a leading client-focused PEO in the transportation and trucking industry.●

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*Samuel F. Rossa is president and CEO of PEOPLEASE, Mount Pleasant, South Carolina.*

## Ataraxis, Inc.

# A Business Model Built Out of Necessity



Stephen Cilley

In 2008, my business partner and I owned a couple of businesses. We heard about PEOs and thought it would be a great solution for administering all the employees. So, I began to search for a PEO in our market. As we explored

the options available, we found PEO offerings lacking. We were asking about HR support and administration, safety, and payroll administration. We were getting answers for some of those things, but at the time, all of them wanted to tie it to benefits. We already had great benefits. We were in the insurance industry competing against insurance companies for benefits. We actually had better benefits than most of what was being offered as alternatives. When we asked prospective PEO partners if they would administer the benefits we had, all of them said "no." If they weren't going to take over a big part of the workload, and we still had to employ someone to do that, it just didn't make sense.

At that point, we began to evaluate how we would want a PEO relationship to work and the value it would bring. As entrepreneurs

and having not found that among the PEOs we researched, we saw an opportunity to bring a PEO to the market that could offer more to a client than just doing the administrative employer tasks or bringing a cheaper option for an insurance product. We started Ataraxis in 2009 and began by servicing the other companies we owned. In 2010, after working through what we could offer, we started taking outside clients.

We set out to build a full-service, high-touch PEO. Our goal is to help our clients run better businesses by being a true business partner, not just an outsourced provider. To accomplish this, we believed we needed to focus on assisting the employees with their needs. While the contract gives us the employer responsibilities, the needs and questions of employees not related to their actual job duties can take lots of time. If we can answer those, then the employer can focus its interactions with the employees to productively achieve their goals and improve the business.

As we worked through how we would charge for our services with our clients, we looked at other service industries we had worked with before, how we were charged, and what went wrong. We realized that if any element of the fee was based on how many times the client contacted us or was based on usage, the relationship would break down. We therefore priced an all-inclu-