

NETSUITE HUMAN RESOURCES

An Overview of SuitePeople and Beyond

11/17/2020



Agenda

Introductions



NetSuite & SuitePeople Overview



Human Resources



Performance Management



Payroll



Questions & Answers



The RSM Team



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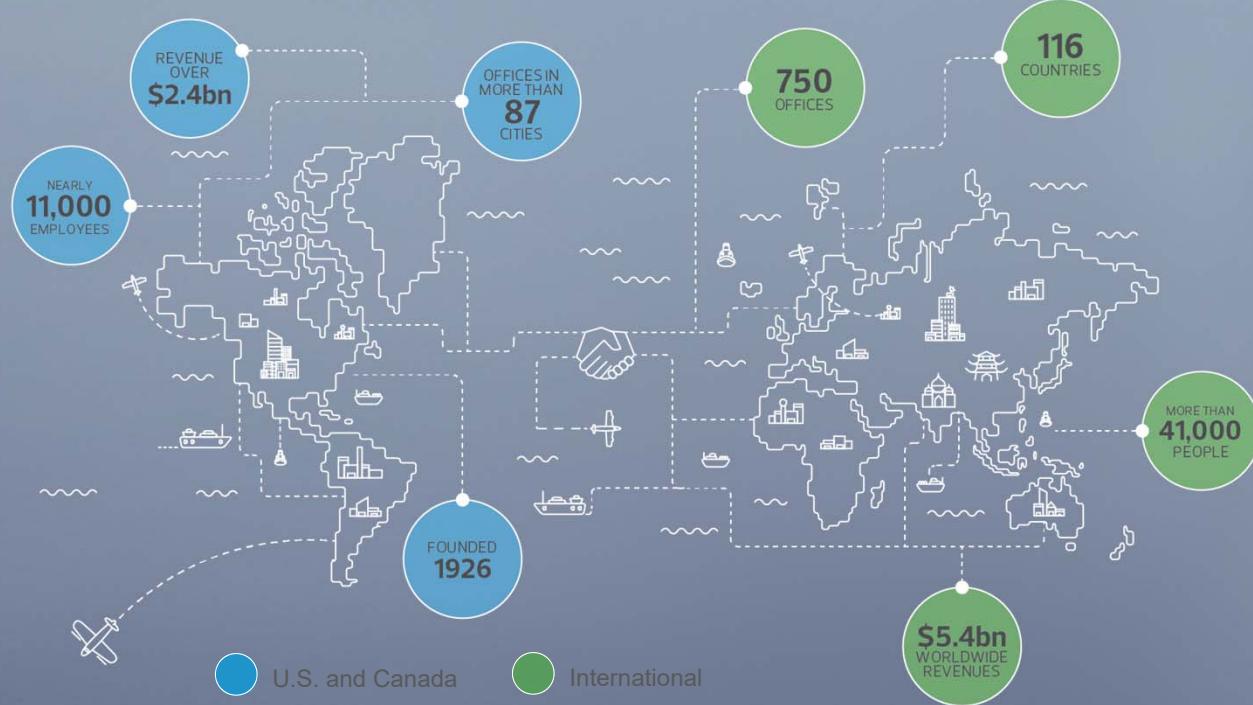


RSM & ORACLE NETSUITE OVERVIEW



RSM overview

**Fifth largest audit, tax and consulting firm in the U.S.
First Choice Advisor in the middle market**



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RSM consulting overview

194 partners/
principals



2,300+ clients



More than **3,000**
consulting professionals



Leading provider of **technology, risk, financial, transaction and business consulting services** - incorporating deep industry **expertise** - to middle market leaders



\$597M
in revenue
in FY19



One of the largest
Microsoft Gold Partners
in the U.S.

46 languages
are spoken by
RSM Consulting
professionals



600+
private equity and
portfolio clients

More than 16%
compound annual
growth rate (CAGR)
over the past five years



Member of the
Institute of Internal Auditors
Principal Partner Program



#1 NetSuite
consulting partner
in the U.S.

NETSUITE#1 CLOUD ERP



- The first cloud company
- 7,000 + employees globally
- 20,000+ organizations and subsidiaries globally
- \$1B+ revenue run rate
- Offices in 15 countries
- Now a global business unit of Oracle

Over 300+ BI Components Available “Out Of The Box”

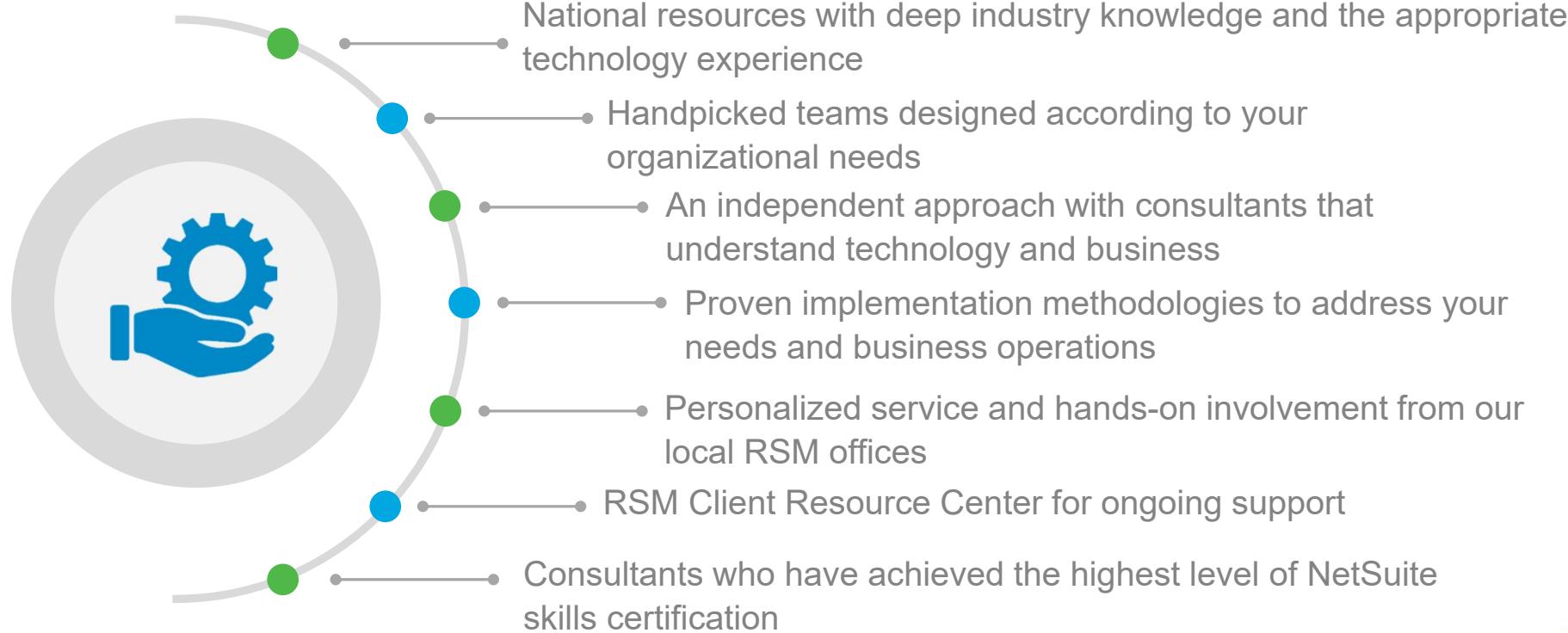
The mobile application interface for NetSuite displays several key components:

- Header:** Shows the NetSuite logo and the text "NETSUITE" and "10:11 PM".
- Left Sidebar:** Includes a "MY TIME" section with "Reported Hours" (24), "Unused Time Entries" (0), and a "Clock In" button. Below it is a "KPHMETER" section with a green progress bar and the text "Income This Quarter" (100%).
- Central Content:**
 - Key Performance Indicators:** Shows metrics like Sales (+61.3%), New Business (+98.5%), Income (+50.3%), and Expenses (+7.4%).
 - Purchase Price Variance:** A line chart showing Purchase Price Variance % over time.
 - Activities:** A list of tasks such as "Sales Forecast Planning", "Sales Forecast Review", "Sales Forecast Finalize", "Sales Forecast Close", "Sales Forecast Reopen", "Sales Forecast Finalize", "Sales Forecast Close", "Sales Forecast Reopen", and "Sales Forecast Finalize".

The NetSuite web-based BI dashboard includes the following sections:

- Reminders:** Lists "Call to complete" and "Purchase Orders to Approve (CEO)".
- Business Alerts:** Displays revenue and grant revenue summaries.
- Expenses by Period Trend:** A line chart showing expenses over time.
- Navigation Portlet:** Provides links to various financial statements, banking/budgeting, purchases, vendors/payables, inventory/items, order management, and customer/receivables.
- Key Performance Indicators:** Shows performance metrics for Payables, Receivables, Total Bank Balance, and Inventory.
- Grants New Opportunity List by Agency:** Lists opportunities such as "Herpetofauna and riparian habitat work at the confluence of the Gila and San Pedro Rivers" and "Media Outreach Channel Islands, CA".

The RSM Approach to NetSuite





SuitePeople & the NetSuite ERP

Which part of the SuitePeople Suite interests you most?

- A. HR
- B. HR & Performance Management
- C. Payroll
- D. HR, Performance Management & Payroll
- E. I don't know much about it, that's why I'm here.



Why Use SuitePeople?

- **Cross Suite Integration Benefits**

- ✓ Payroll management with no per transaction fees
- ✓ Employee record management
- ✓ Track employee costs & productivity
- ✓ Manage PTO requests and PTO liability
- ✓ Real time visibility into workforce data
- ✓ Find & recognize employees
- ✓ Time-off management
- ✓ Performance management
- ✓ Workforce insights & analytics

- ✓ **Unified Solution**





SuitePeople HR Human Capital Management

SuitePeople HR – Human Capital Management

Global Employee Record

Manage employee data in a single source of truth. Advanced Employee Permissions protect employee data.

Change Requests

Employees submit change requests directly & NetSuite provides managers more autonomy and control.

Compliance Management

Audit trail is left with accurate data and change reasoning to meet compliance requirements.

Effective Dating

Audit trail of the employee record and the ability to view the employee record as of a specific date.

Job Management

Salary ranges provide structure for compensation decisions and supports internal compensation equity which improves employee retention and reduces turnover costs.

Job Requisition Tracking

Ensure consistent use of descriptions over time, develop headcount budgets and integrate with Applicant Tracking System.

Company Directory & Org Browser

Directory and org browser are dynamically updated as employees join, leave, transfer or are promoted.

Kudos

Employee recognition drives employee engagement increasing employee satisfaction.

Health & Safety

Documents workplace incidents and ensures regulatory compliance by capturing the requisite data for generating OSHA reports.

Time Tracking

Enter hours worked in individual time entries or a weekly timesheet.

Time-Off Management

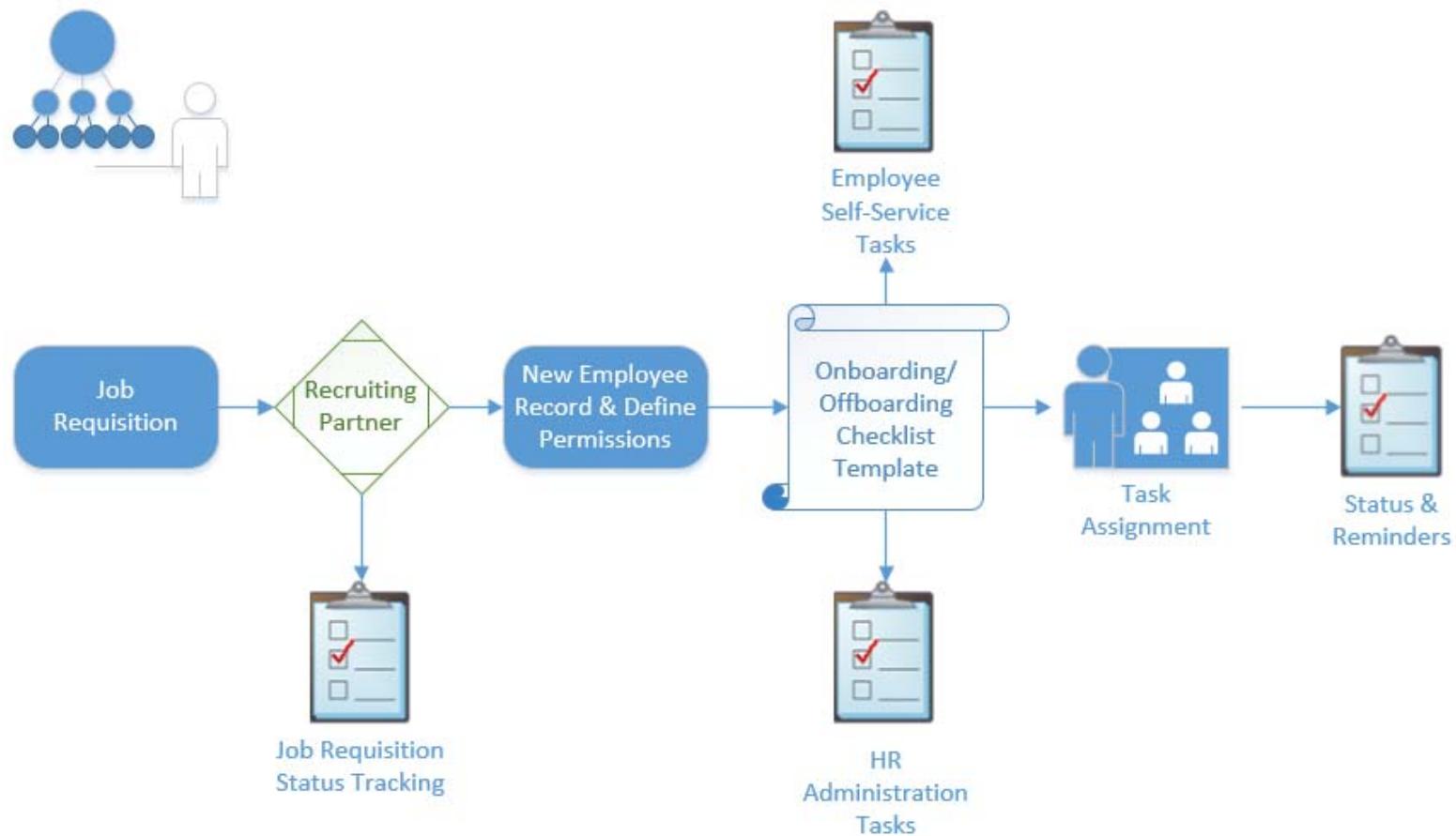
Automated time-off process with a flexible rules engine for Time-Off that can accommodate the complexities of most companies.

Onboarding

Mitigates the risk and cost of turnover by providing a structured onboarding process.

80+ Pre-built HR Reports & Analytics

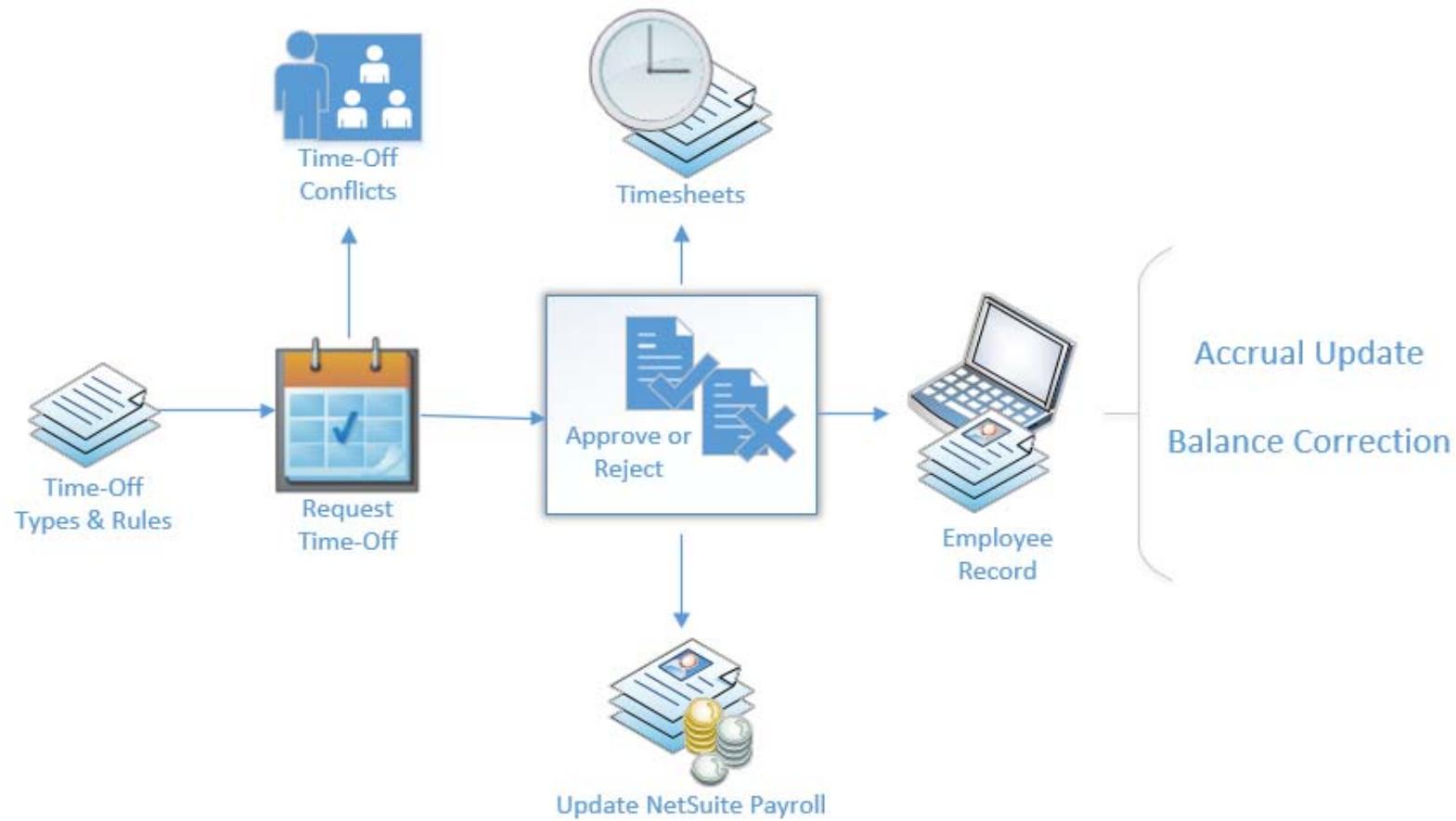
Employee Hire Process, Onboarding & Offboarding



Employee & Manager Self Service



Time-off Management



Security of Private Information

Advanced Employee Permissions

Granular Field by Field Access Control

Administrator Role – No Employee Access





Performance Management

What system do you use for Performance Management?

- A. Nothing
- B. Spreadsheets & Word Docs
- C. A separate application, but we want to switch.
- D. We try, but have not been successful at implementing anything on a regular basis.

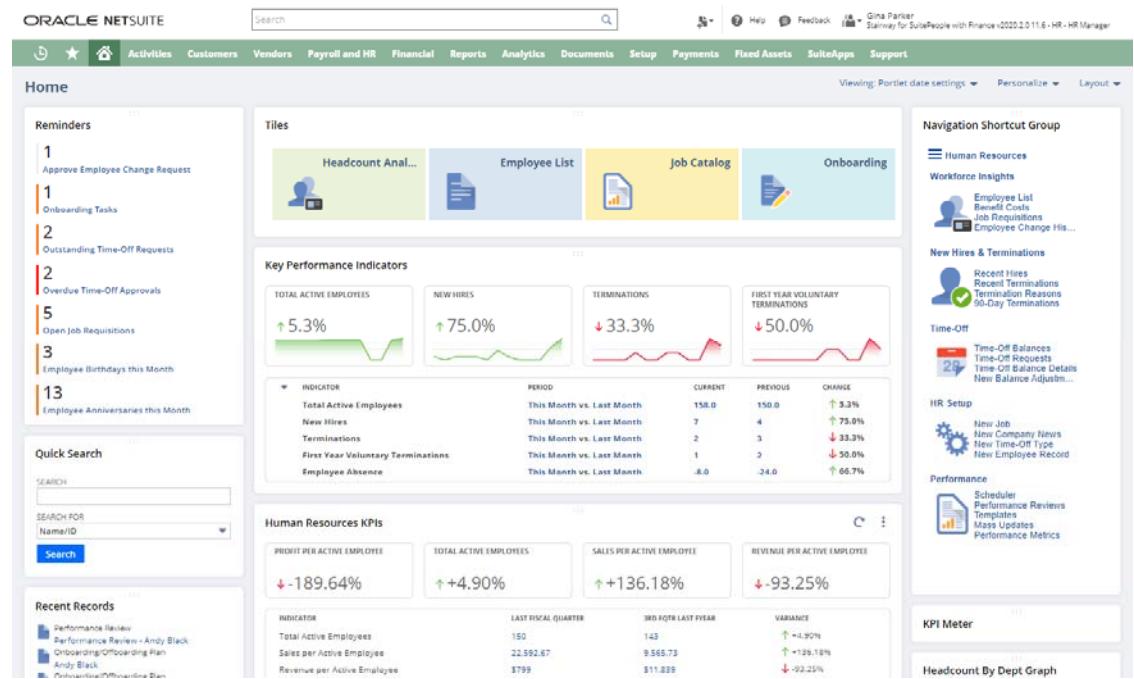
Performance Management

Goal Management

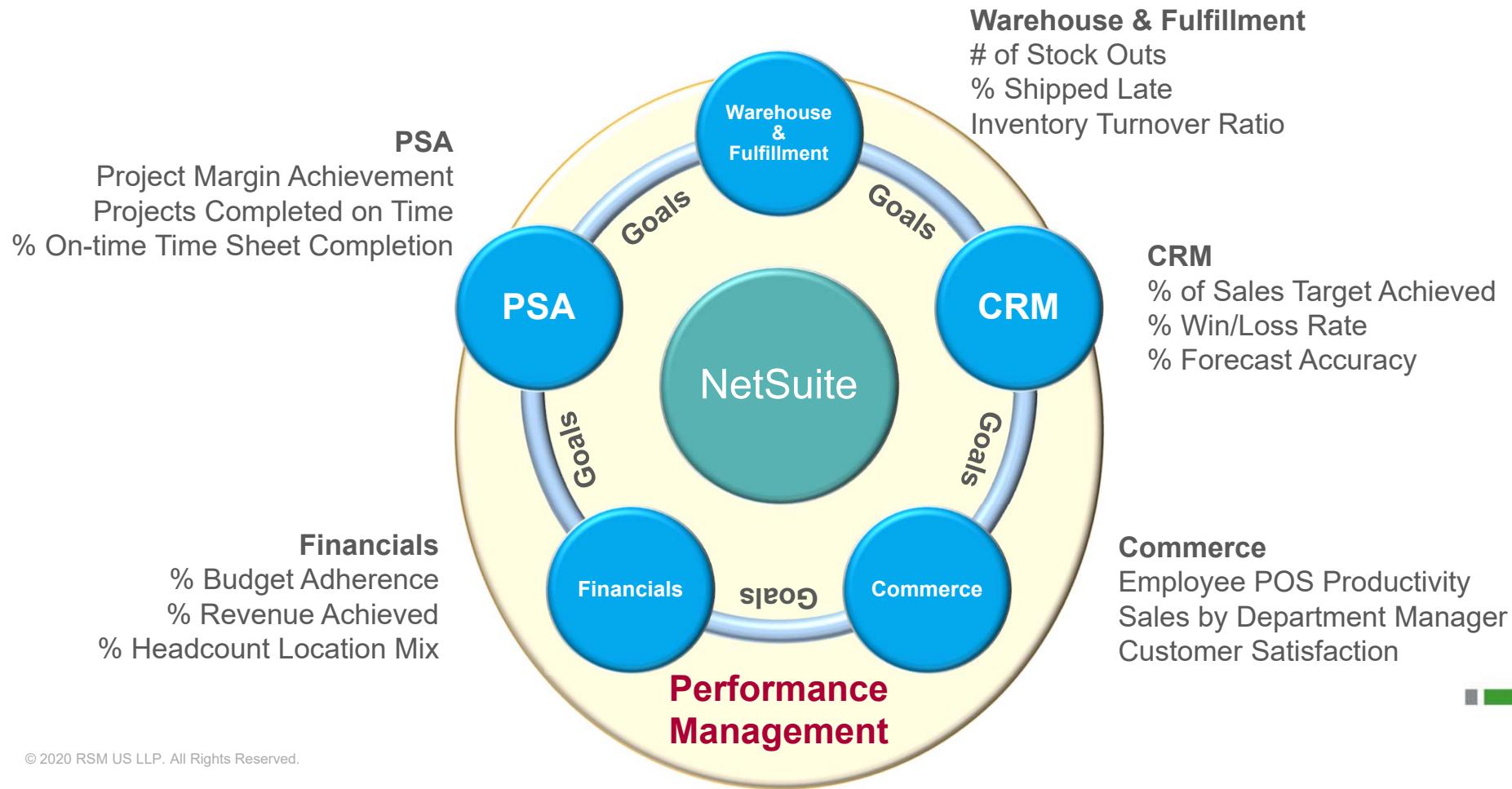
- ✓ Employee ownership of goals
- ✓ Manager approval and collaboration
- ✓ Performance metrics
- ✓ Reporting capabilities

Performance Reviews

- ✓ Define performance questions and scale
- ✓ Assign reviews to employees and reviewer
- ✓ Goals integrated
- ✓ Review and approve reviews



Performance Management SuiteNess

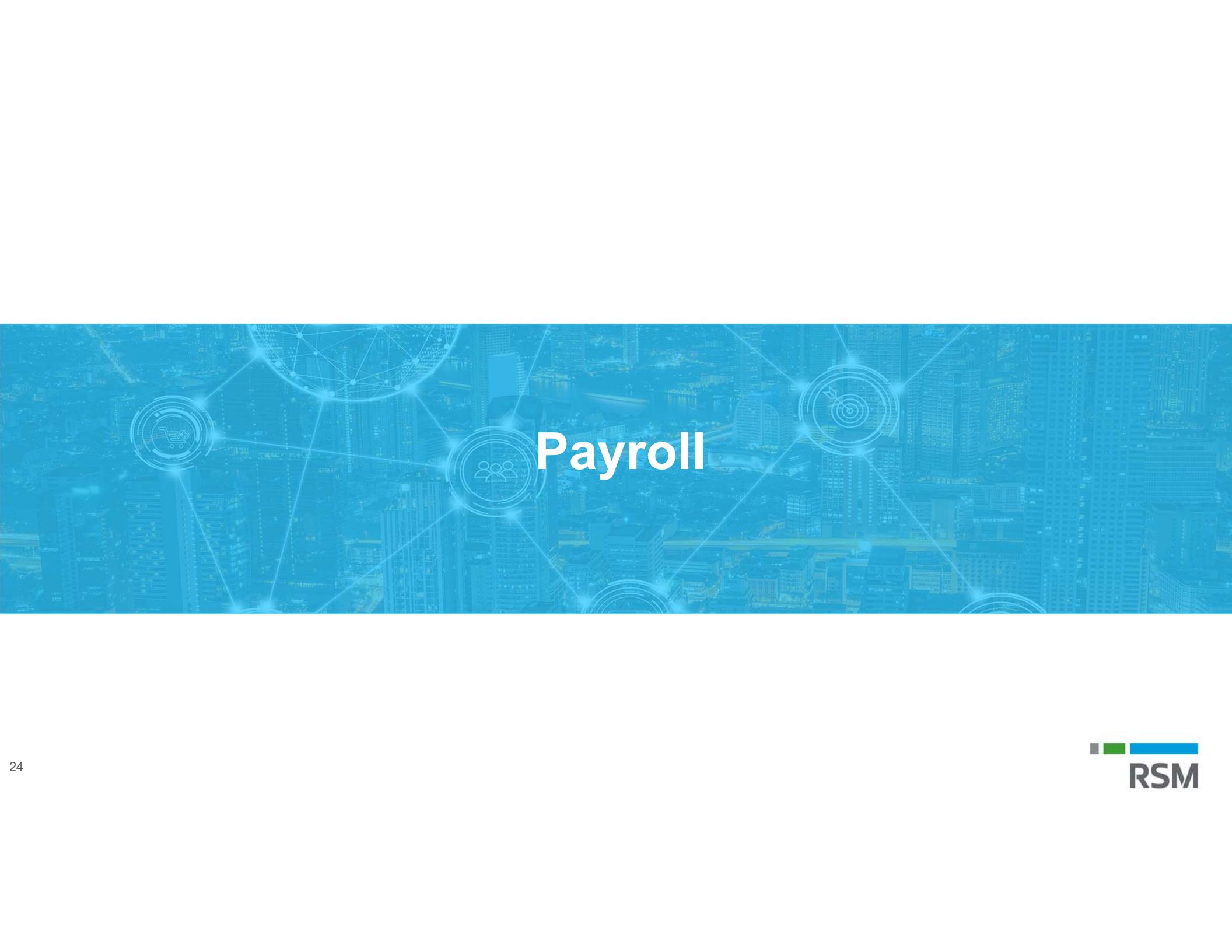


Real-time Data from Across the Suite = **SuiteNess**

Real-Time Performance Metrics attach to goals

Leverage Data Visibility Related to Individual Performance

Goals Automatically Pulled into the Performance Review
Including Performance Metrics



Payroll

How do you currently capture your payroll details in NetSuite?

- A. Enter a summary Journal Entry to capture expenses & liabilities only.
- B. Enter a detailed Journal Entry that captures all expense & liability details by employee.
- C. We have a separate payroll system integrated with NetSuite.
- D. We already use NetSuite Payroll.

SuitePeople – U.S. Payroll

- Fully integrated into SuitePeople HR and Accounting modules.
- All employer and employee payroll taxes paid.
- Form submission to tax authorities.
- Direct deposit included, with printed checks available.
- Supports all federal and state tax, including over 10,000 local jurisdictions.
- Tax law changes monitored and accounted for.
- State tax reciprocity and local tax sharing rules supported.
- Current and cumulative online pay statements for employees.
- Year-end W2 generation and ACA reporting

SuitePeople – U.S. Payroll



ACCURATE

Your deposits and filings are accurate and on time.



INTEGRATED

Completely integrated with NetSuite accounting. No need to re-enter payroll data, so you save time and minimize the chance of data entry errors.



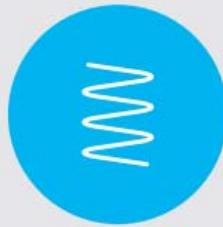
SUPPORTED

Our Payroll support team is APA Certified with tenure ranging 2 to 10 years. Dedicated Payroll phone line and case submission provides assistance with payroll processing, state and federal tax notices.



SIMPLE

Our cloud-based offering shaves time off of payroll processing because there are no software programs to download, buy or install.



FLEXIBLE

NetSuite Payroll works where you do—across 50 states and local jurisdictions. And since NetSuite's platform is built in the cloud from the ground up, custom integrations are easy.

SuitePeople **Demonstration**

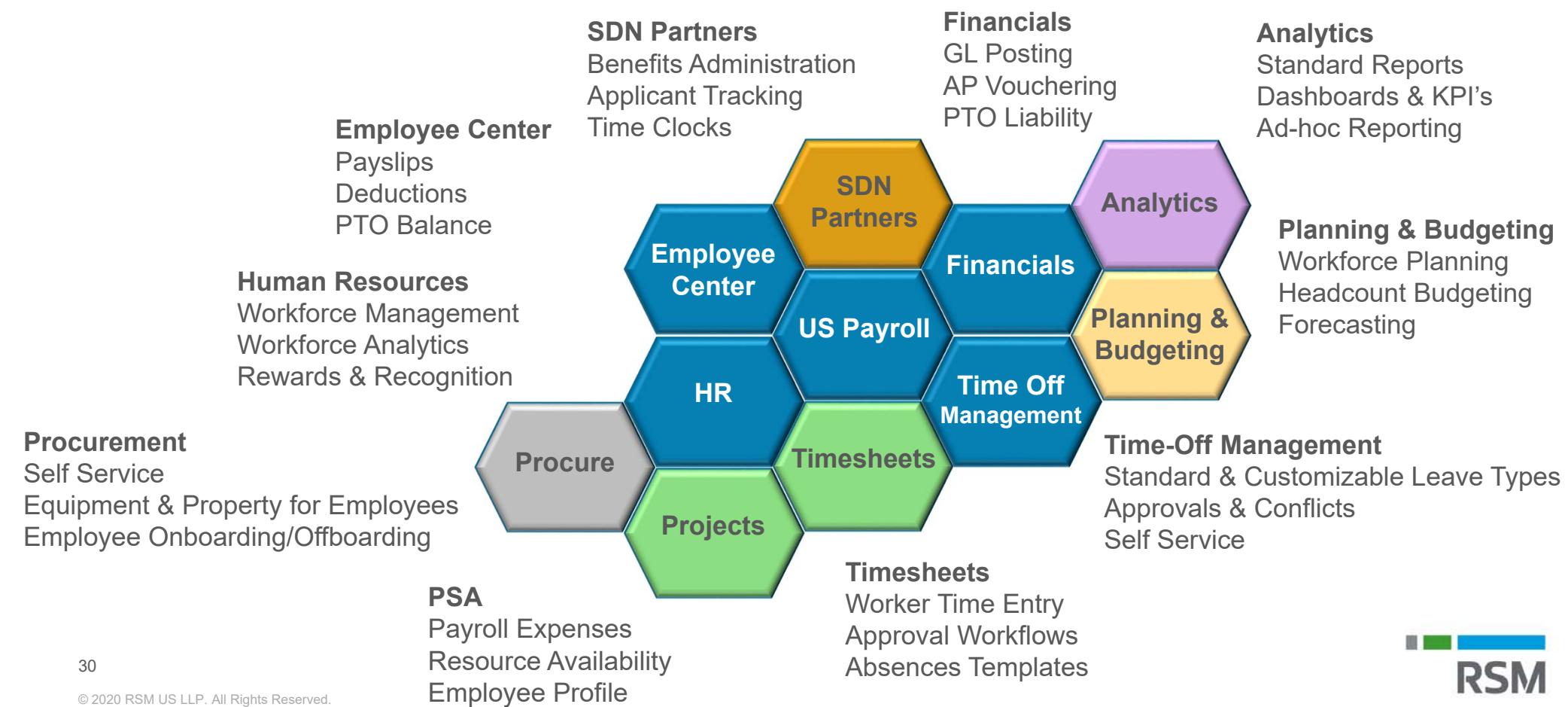
HR - Performance Management - Payroll





The Power of the Suite

SuitePeople – The TRUE Value of a Suite



SDN Partners



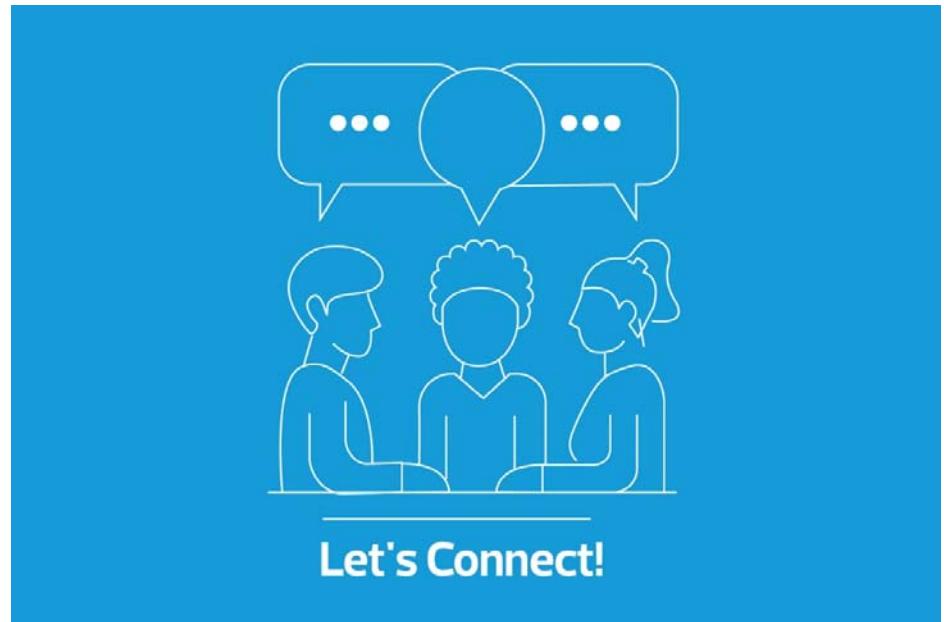
Questions & Answers

Contact your RSM representative to schedule personalized demonstrations.

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Question Ideas

- Does it matter if RSM implemented our NetSuite account?
- Can I have only one of the modules or am I required to purchase all three?
- Can use other performance management systems with NetSuite?
- If I use payroll, is there a limit on the number of off-cycle payroll runs and what are the associated fees?



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