



# How to Explain PrismHR Innovations to Clients and Prospects

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WHITE PAPER

By Kenneth Wright and Scott Cormier  
With James Tehrani

## Innovation.

It starts with that proverbial “light bulb,” that moment of clarity.

For Thomas Edison, that instance led to a literal bright light. For others, it’s completely metaphorical. Regardless, innovation permeates history, and 21st century digital advancements continue to stretch the realm of possibility, imagination and functionality.

Think about it: It took more than 500 years to go from the printing press to the home printer, but it took 50 years to go from the first primitive mobile phone to a smartphone with Artificial Intelligence functionality built in.

And in the Professional Employer Organization (PEO) space, just a few decades ago [self-service](#) was a novel concept for onboarding. In today’s fast-paced business world, self-service is not only a necessity but a welcome commodity.

With the speed of change taking place right before our eyes, it’s no surprise that PrismHR’s innovations are moving full speed ahead as well. Think about it: In the past 18 months, the [PrismHR Data Warehouse](#) turbocharged Report Center. In addition, a new front end allows dashboarding and Data Visualization to provide a new level of insight into your data. The reimagined look and feel of PrismHR’s solutions have also become more intuitive with the [Unified Employee Experience \(UEX\)](#) project. Customers are also enjoying PrismHR’s [Human Capital Management \(HCM\)](#) debut and PrismHR’s [Workforce Management](#) solution.

### 4 Ways to Improve Your Demos

The top [four ways](#) to enhance your sales demos, says Jamie Morrison, PrismHR’s senior sales engineer, are by:

1. Getting leadership on board.
2. Hiring/promoting an experienced sales engineer.
3. Keeping your demo environment up to date.
4. Practicing, practicing, practicing.



**Jamie Morrison**  
PrismHR Senior Sales Engineer

## Innovation Needs Communication

Can a great idea succeed in a vacuum? Of course not. It’s rare when a great innovation flies under the radar.

As technology strategist Alex Goryachev wrote on [Forbes.com](#): “I believe that the single most critical element that separates innovation success from failure is communication. After all, sustainable and successful transformation requires us to communicate, communicate, communicate. And then? Communicate some more. When communication is at its best, so is innovation.”

An experienced sales engineer can help tell a great story about technology and innovation, says Jamie Morrison, PrismHR’s senior sales engineer. “A sales engineer develops a storyboard, and they do this so that they can grab the audience’s attention and pull them in at specific points during the flow of the segments in the demo. And so you want to have it build to a climax, just like a story, with a plot twist and a conclusion that is going to be very positive for them.” So let’s talk about how you can communicate these innovations.

## Innovation: Advanced Data Access

**Key Features:** The PrismHR Data Warehouse was built for speed. That extra horsepower allows for exponential analytic capabilities through data sharing. The technology is not only cutting-edge but also stores data securely while providing almost unlimited opportunity to crunch the data for new and powerful insights.

**Benefits to Clients:** Your clients can have **full control of their HR data** to create reports that are meaningful to their business in a way that's easy to understand through Data Visualization and automation. They will be able to pull in their own data to mix in to create custom reports. The outcome? Businesses can make better business decisions. Spending too much on overtime? Crunch the numbers and figure out the issue. Notice turnover is a growing problem? You will be able to benchmark compensation and benefit offerings for your clients to help them diagnose if it's a monetary problem or perhaps a cultural issue.

**Question:** You mentioned Data Visualization. How would you explain that to a client or prospect?

**Answer:** That's simple. Data comes to life when you can see trends. Whether it's a pie chart, bar chart, pivot table or something else, it's much easier to digest a visual representation of data (think USA Today infographic vs. data in an Excel spreadsheet) when it's presented graphically instead of just a bunch of numbers on a screen. This is something that your small and medium-sized business (SMB) clients have been asking for to help them make better talent-related decisions. Well, that capability is here now!



**Dustin Schodt**  
Vice President of Operations  
SequoiaOne

**Data Visualization and Advanced Data Access** have “been a huge opportunity for us to use the historical data as a predictive model about where our clients are heading and where we’re heading as a PEO and being able to have the right conversations with the clients at the right time in their growth journey. ... These insights that you can generate are very simple. They’re applicable across all clients, across all PEOs.”

## Innovation: Worksite Manager

**Key Features:** Think of Worksite Manager as the hub or homebase where managers go to approve payroll, manage their teams, etc. With the Unified Employee Experience (UEX) (see next page) rollout in particular, Worksite Manager has become much more intuitive with enhanced functionality.

**Benefits to Clients:** The enhancements have made **getting the information managers want to track and approve easy and efficient**. The system will walk users through the various steps to remove the guesswork. Worksite Manager is stylish, modern and allows managers to drill down to get the information they need when or wherever they need it with self-service capability.

**Question:** Can managers approve pay rate and status changes and handle employee leave requests in Worksite Manager?

**Answer:** They sure can. Managers can also complete time entries, review time sheets for accuracy and approve payroll, among other things.

“Continuing advancements for employee and manager functionality so they can be more self-service has always been important for us. Some of those advancements have really moved along, enabling clients to be self-sufficient. I think it’s really an opportunity for them to take control, but also have that PEO expertise to provide that guidance and consulting that they need.”



**Kevin Davis**  
Director of Systems  
SequoiaOne

## Innovation: UEX

**Key Features:** UEX became fully functioning with full feature parity in 2023. The UEX modernization introduced a sleek design, improved functionality and enhanced accessibility while offering clients and worksite employees a streamlined and intuitive platform.

**Benefits to Clients:** Worksite Manager is not the only solution that got the UEX treatment. PrismHR has developed a consistent look and feel throughout its suite of solutions. This means that the software becomes more intuitive for users and offers that modern look and feel that today’s workers and managers want. Being able to offer a **stylish, sleek solution** to your clients and prospects helps you compete for business and helps them to compete for talent in a competitive job market.

**Question:** What can you tell your clients and prospects about UEX?

**Answer:** The UEX project rollout has gotten rave reviews from customers and clients alike. Key selling points include not only ease of use, stylishness and intuitiveness but also accessibility. UEX was designed to meet Web Content Accessibility Guidelines (WCAG) 2.0. What started as a 14-point guideline to do things like provide text equivalents for graphics, video and audio has now morphed into WCAG 2.0, which states content “must be perceivable, operable, understandable, and robust, supported by success criteria for meeting those principles.” Translation: Our software looks better than ever and is more intuitive, too.



**J. Gibbens**  
Director of Product Design  
PrismHR

“The UEX platform revolutionizes the way your clients interact with their HR solutions by delivering a streamlined, intuitive experience that significantly reduces time spent on routine tasks. By enhancing usability and accessibility, UEX empowers your clients to achieve more with less effort, enabling them to focus on strategic initiatives rather than getting bogged down by complex systems. This enhanced user experience not only drives efficiency but also ensures that your clients can deliver exceptional service to their employees, reinforcing their competitive edge in the market.”

## Innovation: PrismHR's HCM solution

**Key Features:** Designed for SMBs to compete with larger organizations, [Human Capital Management](#) has morphed into the intersection of people management, data, reporting, payroll and more. HCM technology drives innovation in HR-related processes with self-service functionality built in. But don't be alarmed; self-service does not mean no service. More about that shortly.

**Benefits to Clients:** As a business continues to grow, it could grow out of the need for a co-employment model, which is the trademark of PEOs. **Being able to stay on a familiar platform** even if your client decides to handle their own HR makes HCM an attractive solution.

**Question:** Won't my margins go down if I offer HCM to my clients?

**Answer:** No. That's the beauty of a self-service model, which has become ubiquitous in today's digital world. Still, it doesn't mean that PEOs can't provide any service. It's just a paid model vs. the typical all-inclusive service model you're used to offering. PEOs can decide to charge for whatever services they want in an HCM model. They can still choose to offer complimentary services if they like, but it's not a necessity anymore.

“When you offer tools that allow clients to do more self-service and offload labor, their satisfaction goes up.”



**Rick Torrence**  
Chief Sales Officer  
PrismHR

## Innovation: Workforce Management

**Key Features:** Introduced in 2024, [Workforce Management](#) is an integrated Time & Attendance tool with the same look and feel of other PrismHR offerings. Workforce Management offers customizable dashboards with widgets to choose from, including “Who Is Out of the Office,” time-off requests, alerts when an employee is close to reaching the overtime threshold and more. It also has Scheduling, Time Off Requests and Onboarding tools baked in.

In terms of hardware, it has the goodies you'd expect, such as industrial-grade biometric fingerprint capability built for “hard use” as well as facial recognition and other tools to combat time theft and “buddy punching” while improving processes.

**Benefits to Clients:** Your SMB clients need state-of-the-art technology and innovation to help them **compete for talent and to better track and plan their workforce scheduling**. That will also allow them to make better business decisions. Being able to offer them a system that is specifically designed to work hand in hand with PrismHR as a natively integrated platform will give them the competitive advantage they need to compete and grow in today's rapidly changing workforce with constantly changing, more-and-more-complex compliance requirements to contend with.

**Question:** How does an Advanced Scheduling solution add value for employers?

**Answer:** Workforce scheduling is often a painful, time-consuming and messy process for managers. What's more, when exceptions occur and adjustments are needed, the true total cost and interruption of that exception can be exponential. But with innovations like Auto-Scheduling and Recommendation Engine, Workforce Management can minimize this cost while optimizing the outcome based on your preferences (e.g., cost, compliance, attendance). Combine that with the ability for employees to swap and drop shifts through a mobile device, workforce scheduling becomes a competitive advantage instead of a problem. PrismHR's new Workforce Management platform not only brings advanced scheduling to employers, but makes the process quick and simple to manage.

“We continue to innovate and expand our capabilities, so that our customers can drive their business through better retention, margin expansion and growth.”



**Kevin Andrews**  
President  
PrismHR

## Conclusion

PrismHR's focus on innovation is just getting started, and you have the tools you need to harness this innovation and transform your client solutions. At PrismHR LIVE 2024, attendees learned about the [PrismHR Tax](#) debut. We are also focused on a new mobile app to make the unified experience even better. And there's more to come! A culture based on innovation is contagious after all, and we want to you catch the excitement! 📌

If you have any questions about PrismHR's products and innovations, please reach out to your Customer Success Manager (CSM).

Need help demonstrating the innovations to clients and prospects? Jamie Morrison, PrismHR's senior sales engineer, can help. Contact her at [prismhr.com/sales-engineering](https://prismhr.com/sales-engineering).

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**Kenneth Wright**  
PrismHR Senior Product Manager

Ken got his start in software and technology working for the U.S. Marine Corps as an aviation electronics technician and has worked in the payroll/HR Software as a Service (SaaS) space for nearly two decades. He is based in the Pensacola, Florida, area.



**Scott Cormier**  
Vice President, Product Management

Scott Cormier joined PrismHR in 2016 and is currently the vice president of product management. Scott brings over 20 years of product management best practice experience and a customer-driven focus to improve and enhance PrismHR's leading HR software platform.



**James Tehrani**

James Tehrani is PrismHR's digital content marketing manager. He is an award-winning writer and editor based in the Chicago area.