HR Time Savings Estimate Software

Step-by-Step Implementation Guide Checklist

1. ☐ Click on the link you were provided in your download instructions email, and SAVE the HRTSES.zip folder to your desktop
2. ☐ Right click on that folder; choose the "Extract" option; and choose or type in the extract location to be a folder named HRTSES on your desktop
3. ☐ Go back to your desktop, and delete the original downloaded HRTSES.zip folder. (This is to eliminate possible confusion of the two folders. You can re-download the application at any time while you are an active subscriber.)
4. ☐ Before you start the process of customizing your new software, it is highly recommended that read pages 3 and 4 in the HRTSES_Instructions.pdf booklet you received (with download).
5. ☐ Customization: Go to the email you received (subject line: Customization of your HR Time Savings Estimate Software) and open/save the attached Excel file. Follow the instructions in the big yellow box on the top of sheet to create your company's unique Offering List. Email that file back to PEO Consulting at rblunt@peoconsulting.com.
6. ☐ Upon receipt of a follow-up email from PEO Consulting telling you that your customized application is ready for download, save the new updated HRTSES.zip folder to your desktop.
7. ☐ Right click on that folder; choose the "Extract" option; and choose or type in the extract location to be a folder named HRTSES on your desktop, and REPLACE the existing files in that folder that you originally downloaded.
8. ☐ Go back to your desktop, and delete the second downloaded HRTSES.zip folder. (This is to eliminate possible confusion of the two folders. You can re-download the application at any time while you are an active subscriber.)
9. ☐ Your current HRTSES folder on your desktop should be considered your "template folder", from which all other sales folders should be created.
10. ☐ Read pages 4 and 5 in the HRTSES_Instructions.pdf book to familiarize yourself with the subsequent file structure you'll work with. In short: Use the HRTSES.exe file in your template folder to create all subfolders you'll work with (for template Sales Sheets, and also for each new Prospect); close that template application after it's creates your new folder; open the newly created folder; and run the HRTSES.exe in the new folder for creation of all the prospect-specific material.
11. ☐ Following the guidance on page 5 of the HRTSES_Instructions.pdf, create a "Sales Sheet Template Folder" under your template HRTSES folder. Main Menu: HRO Business Value "Sales Sheets" > Create 'Sales Sheet' Template Folder.
12. ☐ Running the HRTSES application within the Sales Sheet Template folder, and following the guidance on pages 4 through 8 of the HRTSES_Instructions.pdf, create each of the 4 "Sales Sheets" under the Main Menu Button: HRO Business Value "Sales Sheets"
13. ☐ While you are working in the Sales Sheet Template Folder, you may also want to create and store a template HRO_Assessment_Survey.xls file to take on all initial sales calls. To do so, click the Client's Employment Profile Documentation > Profile Documentation Tools… > Create Survey Forms (Excel) > Clean.
14. ☐ At this point, you are ready to use the Sales Sheets and HRTSES with prospective clients.
    1. Use the 4 Sales Sheets to convey the value of Saving Time;
    2. Use your existing sales approaches to teach and convey business value in areas OTHER THAN Saving Time (or consider upgrading to the HRO Business Value Sales Software);
    3. <u>IF THEY WANT</u> their own custom HR Time Savings Estimate, they <u>**MUST**</u> complete their Employment Profile (15-20 minute, simple, checkmark exercise) and answer the 12 additional Time Profile Questions.