



Mid-Market Special Interest Group

April 15, 2008

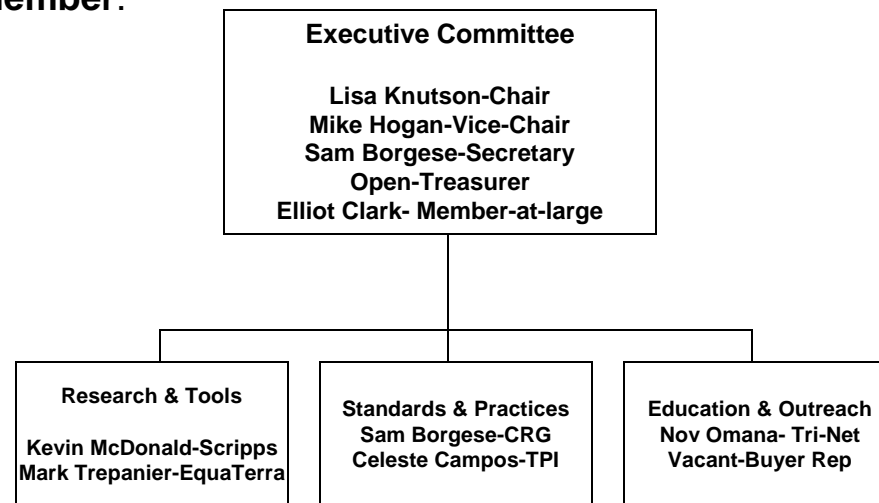
HROA Mid-Market: Agenda

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|-------------------------------|---------------------|
| 1. Call to order | Lisa Knutson |
| 2. Board changes | HROA |
| 3. Committee Structure | Lisa Knutson |
| 4. Committee updates | Co-chairs |
| 5. Marketing update | Mike Hogan |
| 6. Open Forum | All |
| 7. Closing comments | Lisa Knutson |

HROA Mid-Market: Committees

The HROA Mid-Market Special Interest Group (SIG) has established a committee structure focused in three primary areas: **Research and Tools**, **Standards and Practices**, and **Education and Outreach**. Each of these committees have a stated mission and purpose and report into the HROA Mid-Market Executive Committee. Each committee will have co-chairpersons, a buyer chairperson and a provider or advisor. The Executive Committee believes that this is balanced approach to committee leadership and will ensure that all stakeholders have a voice in the process.

All provider and advisor members are required to have at least one of their clients (Buyer) as a member.



HROA Mid-Market: Committee Overview

Research and Tools

The Research and Tools committee will focus on establishing a base of mid-market relevant data and information. The committee will leverage information and process methodology where appropriate from existing HROA research and reports. The committee will facilitate and gather independent research, benchmark data and commentary related to Mid-Market HR outsourcing.

2008 Objectives:

- Design, develop, and implement a mid-market buyers survey
- Create plan for communication of survey results

Standards and Practices

The Standards and Practices committee is responsible for overseeing the development and adoption of effective industry standards and practices for mid-market HR outsourcing. As part of this process, this committee will gather broad-based input from across the industry and work to develop industry consensus and to arrive at conclusions that balance the various interests of all participants. Co-chairpersons will participate in the HROA Standards and Practices committee representing the interests of the Mid-Market.

2008 Objectives:

- Review recently publicized standards and determine applicability for the mid-market
- Determine other mid-market standards that need to be established and prioritize development

Education and Outreach

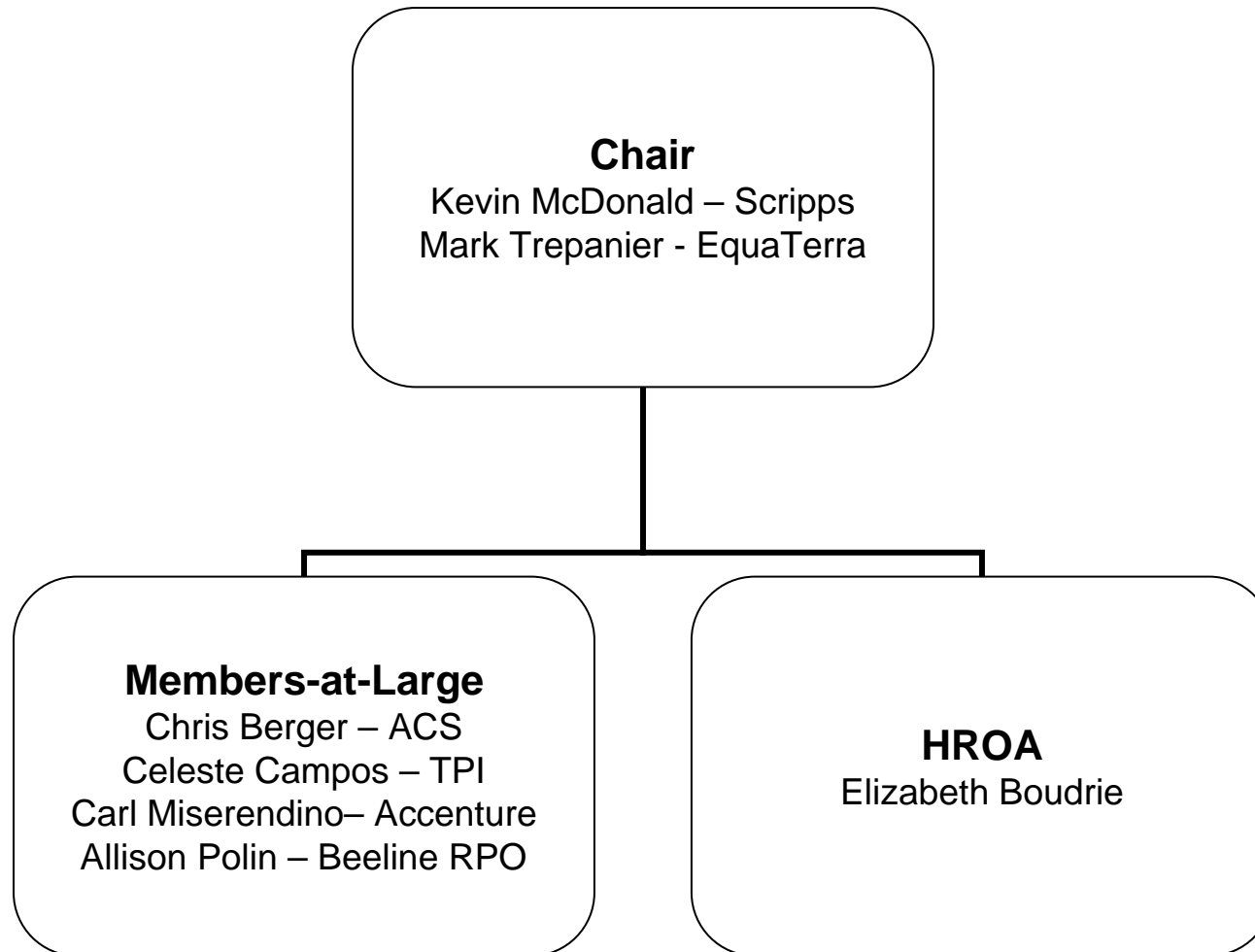
The Education and Outreach committee will focus on increasing membership in the HROA as well as knowledge-sharing events and education and development programs for all members. The committee will place an emphasis on buyer related activities from best practice sharing to the establishment of a Mid-Market buyers forum. This committee will work to help influence and enhance the buyers development by sharing of information and insights gained from selecting and managing HRO partnerships

2008 Objectives:

- Grow membership in the Mid-Market SIG by 20% in the first year
- Establish the “bring-a-buyer-along” program for providers and advisors
- Launch first annual Mid-Market event in fourth quarter of 2008
- Establish Mid-Market buyer “mentoring” program



Research & Tools: Membership



HROA Mid-Market: Research and Tools

Mid-Market SIG

STRATEGIC ACTION PLANNING AND REPORTING - RESEARCH AND TOOLS

Strategic Action:		KPIs:	Targets:	Owner:	Progress				
1.1. Design, develop, and implement a mid-market buyers survey		TBD							
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
1.1.1	Formally constitute committee	McDonald	First meeting, endorsed mandate & plan	31-Mar	x				Green
1.1.2	Finalize charter/mandate	McDonald/Trepanier	Endorsed by committee	31-Mar	x				Green
1.1.3	Finalize plan	Trepanier	Endorsed by committee	31-Mar	x				Green
1.1.4	Develop survey objectives	Boudrie	Finalize with core group	15-Mar	x				Green
1.1.5	Develop 1st draft survey	Boudrie	Finalize with core group	15-Mar					Green
1.1.6	Develop target list	TBD	Endorsed target list	30-Apr		x			Yellow
1.1.7	Finalize survey	Boudrie	Endorsed survey	15-Jun		x			Green
1.1.8	Release survey	Boudrie	Endorsed survey	1-Sep			x		Green
1.1.9	Accumulate and analyze results	Boudrie	Survey Result Report out	15-Nov				x	Green
Strategic Action:		KPIs:	Targets:	Owner:	Progress				
2.1. Create plan for communication of survey results		TBD							
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
2.1.1	Develop communications objectives	TBD	TBD				x		Green
2.1.2	Determine target audience(s)/stakeholders	TBD	TBD				x		Green
2.1.3	Develop communications plan	TBD	TBD				x		Green
2.1.4	Execute communications plan	TBD	TBD					x	Green
2.1.5									

Standards & Practices

- **The HROA Board of Trustees established a Standards & Practices Sub-Committee to oversee global setting of standards and practices based on core principles:**
 - Open and transparent process
 - Rigorous peer review
 - Encouraging market competition
 - Evidentiary research

- **HROA Mid-Market has a designated seat on the Sub-Committee to ensure input from the middle market. Sam Borgese of Catalina Restaurant Group serves in this capacity.**

- **The Sub-Committee encourages all members and interested parties to participate in the process by submitting and reviewing standards and practices.**

- **First practices on SLAs and pricing methods were published earlier this month.**

Education and Outreach

■ Charter and Goals of this committee are being developed.

- Nov Omana, Trinet – Chair
- Buyer Member needed for Co-Chair
 - ▶ Elliot Clark – Crossing Media
 - ▶ Stefanie Adams – Ceridian
 - ▶ Terrence McCrossan – ADP
 - ▶ Mary Ellen Howe - ADP

Education and Outreach

Mid-Market SIG

EDUCATION and OUTREACH Committee

Strategic Action:			KPIs:	Targets:	Owner:	Progress			
1.1. Increase membership in HROA Mid-market SIG			TBD						
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
1.1.1	Institute programs of new providers bring a client	Omana		1-Jul		*			Green
1.1.2	Create program with affiliate, IHRIM.ORG for cross	Omana		1-Jul		*			Green
Strategic Action:			KPIs:	Targets:	Owner:	Progress			
2.1. Set up a webinar schedule (in progress—talks with Everest and Equaterra)			TBD						
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
2.1.1	Select sponsor	TBD	TBD				x		Green
2.1.2	Select topic	TBD	TBD				x		Green
2.1.3	Market webinar	TBD	TBD				x		Green
Strategic Action:			KPIs:	Targets:	Owner:	Progress			
2.1. Set agenda for Mid-Market tract of October 2008 HROA Summit			TBD						
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
2.1.1	Select content/topics	TBD	TBD				x		Green
Strategic Action:			KPIs:	Targets:	Owner:	Progress			
2.1. Promote Mid-Market as fastest growing segment of HRO			TBD						
Ref #	Activities	Resp	KPIs	Targets date	Milestones				Traffic Light
					Q1	Q2	Q3	Q4	
2.1.1	Set approach	TBD	TBD					x	Green

Issues

1.1.6 None so far

HROA Mid-Market: Marketing Information

Accomplishments

- Press Release announcing launch of Mid-Market Special Interest Group
- HROA Mid-Market SIG website launched with limited content
- Work with committee members to aggregate and promote relevant content
- Mid-Market SIG “Benefits of membership” slick created

Upcoming Events

- Webinar – Need sponsor and to firm up date for first call
- Front Cover HRO (Lisa) – Finalizing with Elliot Clark
- April 16th Mid-Market SIG Cocktail reception
- October– Mid-Market Symposium



HROA Middle Market: Events Calendar

November	December	January	February	March
<ul style="list-style-type: none"> ❖ RPO Summit 11/6 ❖ HRO World Europe 11/27-11/29 ❖ HROA Board Meeting 11/27 		<ul style="list-style-type: none"> ❖ Launch HROA Middle Market SIG ❖ HROAMM Board Meeting 1/14 	<ul style="list-style-type: none"> ❖ HROAMM Board Meeting 2/11 	<ul style="list-style-type: none"> ❖ HROAMM Board Meeting 3/10

April	May	June	July	3-4Q 2008
<ul style="list-style-type: none"> ❖ HRO World NY 4/15-4/17 ❖ HROAMM Board Meeting 4/15 ❖ HROA Board Meeting 	<ul style="list-style-type: none"> ❖ HROAMM Board Meeting 5/12 	<ul style="list-style-type: none"> ❖ HROAMM Board Meeting 6/16 	<ul style="list-style-type: none"> ❖ HROAMM Board Meeting 7/14 	<ul style="list-style-type: none"> ❖ HROAMM Symposium- (October)

