



Current as of: September 2020

Channel Partner Program

Offer innovative workforce solutions to your clients

Overview

1 Meet Oasis®

Meet Oasis®
Powered by Paychex®, Inc

2 Your client's business challenges

Attract and retain talent
Focus on your core business
World-class benefits
Mitigate risk

3 PEO Solutions

Your HR Generalist

4 Power of Paychex

5 Partnership that Pays

6 Next steps



A Relationship that Pays

Check out our [Profit Calculator](#) to estimate your payment potential

Case Study

- 25 employee company
- \$1,000 average Administrative Fee per employee per year
- 20% Channel Partner payment on Administrative Fee paid monthly with no cap or limit

Success Stories

Example #1

- Active since 2015, 57 current clients/1723 WSEs
- **\$54,235 in monthly payments**
- **\$650,826 in estimated annual payments**

Example #2

- Active since 2010, 18 current clients/677 WSEs
- **\$24,099 in monthly payments**
- **\$289,198 in estimated annual payments**

Example #3

- Active since Jan 2020, 2 current clients /203 WSEs
- **\$5,323 in monthly payments**
- **\$63,881 in estimated annual payments**

Example #4

- Active since 2018, 21 current clients/357 WSEs
- **\$10,930 in monthly payments**
- **\$131,169 in estimated annual payments**


Meet Oasis®

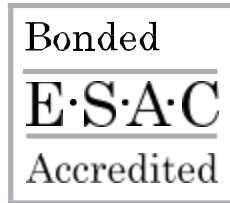
A professional employer organization (PEO) industry leader and trusted advisor.

100+
years combined
experience

1.5
million worksite
employees

National provider
 **with local
service**

52,000 HR services clients
 **PEO
15,000**



Powered by Paychex[®], Inc.

Oasis was acquired by Paychex in 2018 creating the second largest PEO in the United States and perhaps the most robust provider of PEO and HR outsourcing in the industry.

PEO industry leader and trusted advisor

600 HR professionals
with average tenure of 7 years

Compliance professionals monitoring regulatory changes

#1 401(k) recordkeeper
in the U.S.*



Take advantage of our size and strength

As a comprehensive PEO, Oasis® can assist your clients with HR administration tasks, helping you to foster loyalty and expand your revenue stream. This will enable your clients to benefit and become better positioned to:



Attract and retain talent

We can help you offer programs and benefits that enable your clients to recruit and retain the very best employees in today's marketplace.



Focus on their core business

We can provide support for many of your clients Human Resources and Payroll administration tasks.



Offer world-class benefits

We can help your clients to design package that will enable benefits able them to compete with *Fortune 500* companies for the best employees.



Mitigate risk

We help keep your clients in compliance by keeping track of complex employment laws and offering risk management strategies.



Access next-gen technology

Our best-in-class websites make it easy for your clients to manage Human Resources, Payroll and Benefits.



What do business owners worry about?

Aside from your competitors, what is the single most important problem facing your business today?

- 28% Revenue generation and cash flow
- 20% Labor matters and benefits
- 17% Ever-changing State and Federal government requirements

Source: Human Capital Management CEB, Small Business Pain Points, Arlington, VA 2017

What our Channel Partners tell us

- 66% say their clients look to them for HR advice
- 73% are not prepared with a comprehensive response

Source: Human Capital Management CEB, Small Business Pain Points, Arlington, VA 2017

Aligning with Oasis Delivers Real Value

Attract & Retain Talent

Do your clients struggle to attract and retain the best available talent?

Research has proven that clients who work with a PEO have fewer concerns about hiring, retaining and motivating employees.

Offer World-Class Benefits

Can the benefits your clients offer compete with those offered by much larger employers?

PEO clients **MAY BE ABLE TO** significantly reduce the cost of health benefits, compared to those who go it alone.

Focus on Their Core Business

Are your clients spending time on nonrevenue producing tasks like HR administration and other back-office functions?

Companies that work with a PEO can save UP TO \$1,775 per employee per year.

Mitigate Risk

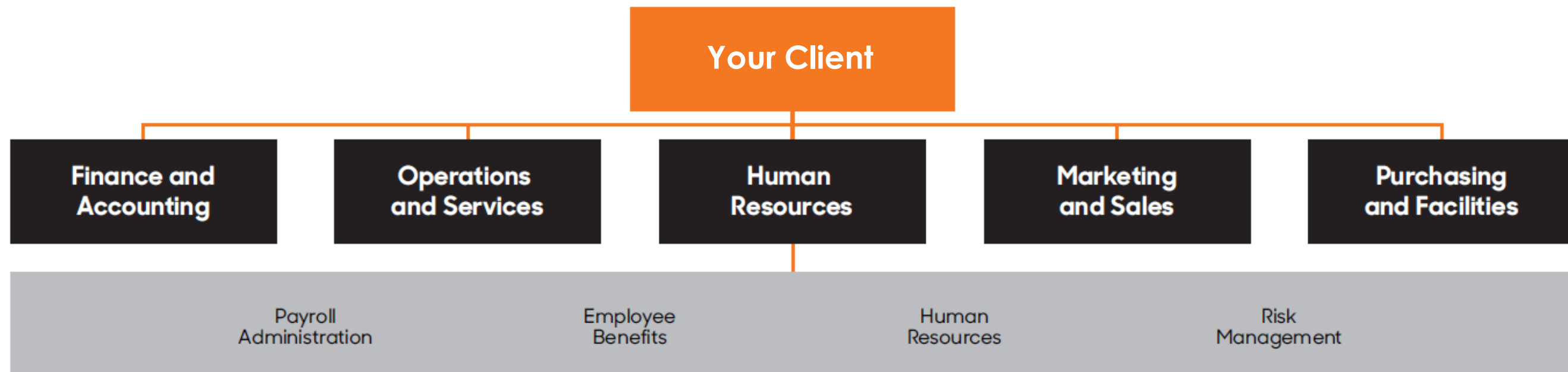
How do you ensure you are maintaining compliance in an ever-changing regulatory environment?

On average, business owners spend 25-35% of their time on HR-related work.

Our solutions

A relationship with Oasis means your clients have access to a comprehensive suite of employment-related products and services.

By relying on us to take some of the day-to-day administrative tasks off their hands, they can focus their time and energy on growing their business and their customers.



A Dedicated HR Professional For You *and* Your Clients



Your Oasis HR Professional will **HELP** take care of many time-consuming administration tasks on your behalf, such as annual enrollment, 401(k) testing, paperwork for new hires, and so much more.

Achieve goals for your clients and for your business

Your clients can experience increased revenue, controlled expenses, and protection of their business.

You can experience increased revenue, foster client loyalty, and differentiate your business from competitors.



Small businesses that work with a PEO can realize cost-savings of up to \$1,775 per employee, 20% less employee turnover, 63% lower healthcare costs, and significantly fewer concerns related to hiring, retaining and motivating employees

Sample payment plan with Oasis*

Payment calculation on administrative fee

Total Employees	Admin Per EE Per Year	Annual Admin Fee	Payment Rate	Annual Payment**
25	\$1,000	\$25,000	20%	\$5,000

Sample residual payment plan***

	Sales Quarter	Total New EEs Per Quarter	Admin Fee Per EE Per Year	Annual Admin Fee	Payment Rate	Annual Payment	Cumulative Annual Payment
Year 1	1 st qtr	25	\$1,000	\$25,000	20%	\$5,000	--
	2 nd qtr	50	\$875	\$43,750	20%	\$8,750	\$13,750
	3 rd qtr	75	\$800	\$60,000	20%	\$12,000	\$25,750
	4 th qtr	100	\$750	\$75,000	20%	\$15,000	\$40,750
Year 2	1 st qtr	25	\$1,100	\$27,500	20%	\$5,500	\$46,250
	2 nd qtr	200	\$750	\$150,000	20%	\$30,000	\$76,250
	3 rd qtr	50	\$875	\$43,750	20%	\$8,750	\$85,000
	4 th qtr	75	\$800	\$60,000	20%	\$12,000	\$97,000

*This is a sample demonstrating how the payment program can work based upon the assumptions noted. This is not a guarantee and employee sizes, service fees and percentages paid can vary.

**Payments are paid monthly with no cap and no limit

***The residual is paid per the elected continuation as stipulated in the Oasis Channel Program Agreement

Our Channel Partner Experiences

“As an independent brokerage that has a consultative approach to our business, it only makes sense to have a partnership with a trusted partner like Teresa at Oasis who can help our clients with additional HR and PEO needs. The majority of PEOs are only looking out for themselves and their bottom line which equates to them not having the clients’ best interests at heart. That this is NOT the case with Oasis. They do right by their clients and are willing to partner. I can speak to numerous instances where we have been able to partner together and bring a blended PEO / payroll / direct market benefits program to the table simply because that is what was best for the client.”

Ryan Holloway, Owner, Holloway Benefit Concepts

“As an independent broker for 20 years and now a producer at a large brokerage company in Texas, I continue to realize how Oasis helps me close business and keep it on the books for years. Their flexibility with insurance offerings is key to my success. The follow up service from Oasis staff secures the business against all competition, which is my favorite aspect of Oasis because its building my repetitive revenue. I very satisfied with the experience and professionalism from my Oasis Sales Rep., Teresa Thompson. She has won many cases I could not have won without her integrity and knowledge.”

Bryan C. Keathley, Executive Vice President, Higginbotham

As a PEO broker within IOA, with many options in the marketplace, Oasis is my ‘go to’ solution for clients needing a PEO. It starts with a reliable and trustworthy relationship with Sylvia Parker through the sales process and Oasis is key because of the absolutely robust and competitive benefits package. I became a huge fan of Oasis with the APL GAP plan strategy which I thought was very unique and very beneficial to my clients. Additionally, the Oasis 401K offering is one of the best in the industry. The asset management fees are by far one of the lowest in the industry, the access for enrollment is extremely easy to utilize, and the typical savings are an incredible return on investment for my clients. Lastly, the thorough service model through and after implementation and advanced technology offered is also a leading element compared to all other PEO’s I work with. Oasis is my top recommendation to clients and prospects!

**Gianclaudio Planzo, PEO & Employee Benefits Specialist,
Insurance Office of America**

As an Employee Benefit Consultant having worked with numerous Insurance Carriers and PEOs over my 30+ year career, my experience with Oasis PEO has been outstanding. Working with my service team at Oasis on new prospect opportunities and client renewals has been a pleasure. They are great with communication and a focus to always keep me “in-the-loop” on developments with my clients. My clients have received excellent service and timely follow-up from their dedicated team of professionals. Also, the benefit options for the employees are competitively priced. I would highly recommend them for employers that are looking for an economical, bundled solution for Benefits, HR, Payroll and Ancillary Services.

Stanley Lozinski III, Comprehensive Financial

Next Steps

Let's get started!

1

Review the agreement

2

Complete and various submit paperwork

3

Take a tour of the Channel Partner Resource Center

4

Reach out to clients

5

Start earning payments



Appendix: Workforce Solutions

Check out the breadth and depth of our solutions

Payroll Administration	Human Resource Services	Employee Benefits	Risk Management
<ul style="list-style-type: none">• Preparation and Distribution• Web-based Payroll System• Expense Management• Employee Website• Tax Compliance	<ul style="list-style-type: none">• Infrastructure Development• Administrative Support<ul style="list-style-type: none">• New Hires• Tracking and Reporting• Tracking Federal and State Law AND Regulatory Guidance• Operations Partnership• Growth & Development	<ul style="list-style-type: none">• Health and Other Insurance• Financial Savings Plan• Administration & Support• Healthcare Reform Support• Employee Programs• Regulatory Assistance	<ul style="list-style-type: none">• Return to Work Program• Risk Management• Regulatory Compliance Assistance

Appendix: Workforce Solutions

Technology	Client and Employee Discounts	StaffSourcing*
<ul style="list-style-type: none">• Getting Started Website• Client/Employee Services Websites• Client/Employee Mobile Apps• Electronic Onboarding• Applicant Tracking• Performance Management• eLearning Oasis• TimeKeeper - Time & Attendance	<ul style="list-style-type: none">• Retailers• Health & Wellness• Travel and Entertainment• Financial and Legal• Education• Services• Pet Insurance and Discounts• And more	<ul style="list-style-type: none">• Job Posting Assistance• Recruitment Assistance• Recruitment Support• Full-Service Recruitment• Direct Hire Placement• Resume Mining• Outplacement• Skill & Behavioral Assessments• Background Checks/Drug Testing <p>* Charged at an additional fee</p>

A woman with voluminous, dark curly hair is the central focus, wearing a white button-down shirt. She is looking directly at the camera with a slight smile. The background is a blurred restaurant or bar area with warm lighting, including a glowing circular light fixture and other patrons.

Thank you for your time.

Innovative Workforce Solutions

Professional employer organization (PEO) services provided by Oasis Outsourcing, Inc. (Florida employee leasing license GL42) and its affiliates, which are licensed or registered to provide PEO services where required by law.

Oasis
A **PAYCHEX** company