



the results company



# New Hire Orientation

Katie Zak | Q1 2023

# Getting to Know You

- Name
- Location
- Role & Experience
- Where is your favorite place you've traveled to?



# Your Presenter & Onboarding Champion



## Katie Zak

Learning & Development Manager

[Katie.zak@hso.com](mailto:Katie.zak@hso.com)

LinkedIn

### Key Areas for HSO



*Onboarding*



*Performance  
Management*



*Education and  
Development*

- Born and raised in Minnesota
- I've been in the Microsoft Channel since CRM 4.0 and served in global leadership positions at PowerObjects-HCL Technologies.
- Favorite place I've traveled: Madurai, India (Meenakshi Temple)
- Your voice is valued. Don't hesitate to reach out if you have any questions or feedback!

# Agenda

1

Introduction to HSO

2

HSO US Overview – Enterprise Solutions & ProServ Business Units

3


Onboarding Plan & Milestones

4

Helpful Resources and Contacts

5

Q&A



We will share a  
copy of the slides



# About HSO

**HSO is a Business Transformation Partner with deep industry expertise and global reach.**

**We leverage the full power of Microsoft technology to transform the way you work and improve business performance.**

We help companies modernize business operations, adopt intelligent automation, deliver real-time performance insights and connect the enterprise – accelerating the impact of digital transformation.

Founded in 1987 and recognised as a trusted advisor, HSO is one of the world's top business solution and implementation partners, large enough to serve, small enough to care.



the results company



**OUR MISSION:** To be the leading global provider of technology driven business solutions that improve the business performance and results of our clients.



# HSO – Transforming the Way We Work

## GOAL

**to drive improvements in your business performance** by leveraging the power of Microsoft technology to create an intelligent *data-driven* enterprise, accelerating the impact of digital transformation.

## PURPOSE

**to use technology to transform the way you work** for the benefit of employees, businesses and the customers they serve.

## MISSION

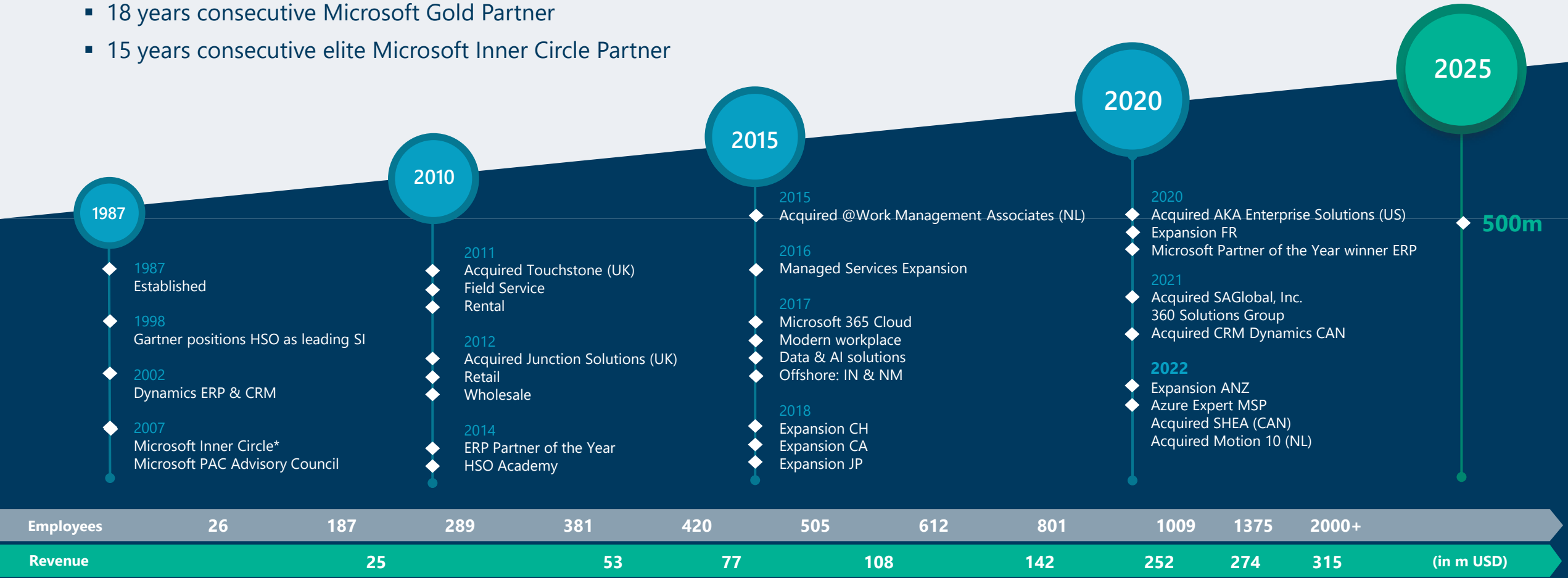
**to become the leading global provider of technology-driven business solutions** that improve the performance and results of our clients.

## VISION

**delivering success through empowerment.**  
using technology to empower every person and every business to accomplish more and achieve their potential.

# Our History is Our Strength

- 30+ years delivering ERP and CRM Enterprise Solutions worldwide
- 2500+ successful implementations, with >1200 unique clients
- Top 3 Global Microsoft Dynamics 365 partner
- 18 years consecutive Microsoft Gold Partner
- 15 years consecutive elite Microsoft Inner Circle Partner





# A Brief History of HSO US

FEB.  
2020

- Recent investment from **The Carlyle Group**
- Great progress in **Europe and Asia**
- ~**25 employees** and slow growth

AUG.  
2020

- Acquired **AKA Enterprise Solutions**
- Push from Jack and Alan to be **fully integrated**, became **HSO Enterprise Solutions business unit**
- ~**150 employees**

JAN.  
2021

- Acquired **360 Solutions Group**, formerly **sa.global's US subsidiary**
- Became **HSO ProServ**, **business unit** focused on **Professional Services**
- Creation of **US shared service group**
- **300+ employees**

# ONE POWERHOUSE TEAM



ProServ



Enterprise Solutions

# ONE POWERHOUSE TEAM



**350+** team members



**Global industry leadership**  
in Financial Services &  
Professional Services



**\$100M+**  
projected  
revenue



**Service line leadership & revenue plans** across all service lines



**Vertically focused** with **5 industries**

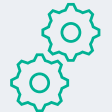
# Initiatives to Push HSO US Forward

**1**  **Marketing** restructuring

**2**  **Manufacturing** industry investment

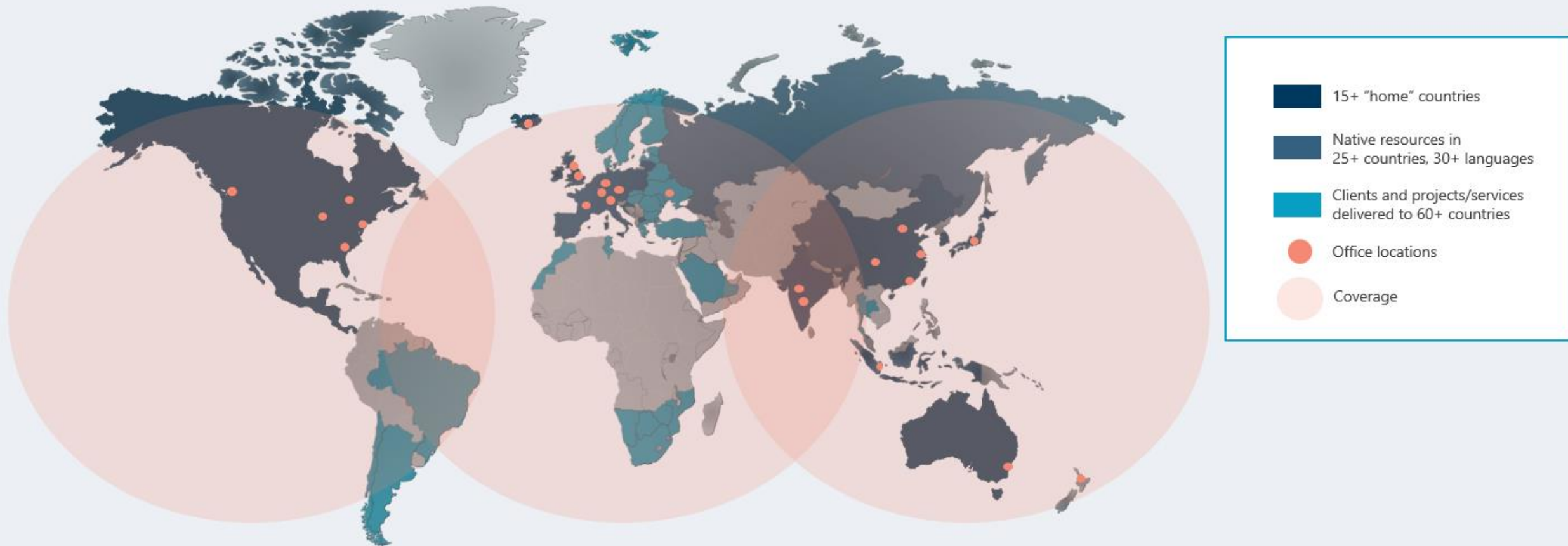
**3**  Strengthened **recruiting**

**4**  Strengthened **leadership in delivery**

**5**  Strengthened **methodology**

**6**  Broadened **service offerings**

# HSO – Global Reach





# HSO Global Managed Services

## Consistent Deployment – At Scale



**30+**  
languages



**41**  
countries  
implemented



**48**  
localization  
partners



### International

Global deployments,  
centralised contracting  
and ownership



### Enterprise Solutions

Unified Operations,  
Customer Experience,  
Analytics and Cloud  
Application Platform



### Support

Global support,  
migrations  
and application  
management



### HSO Innovation

Add-ons/extensions  
IP, best practise and  
industry solutions

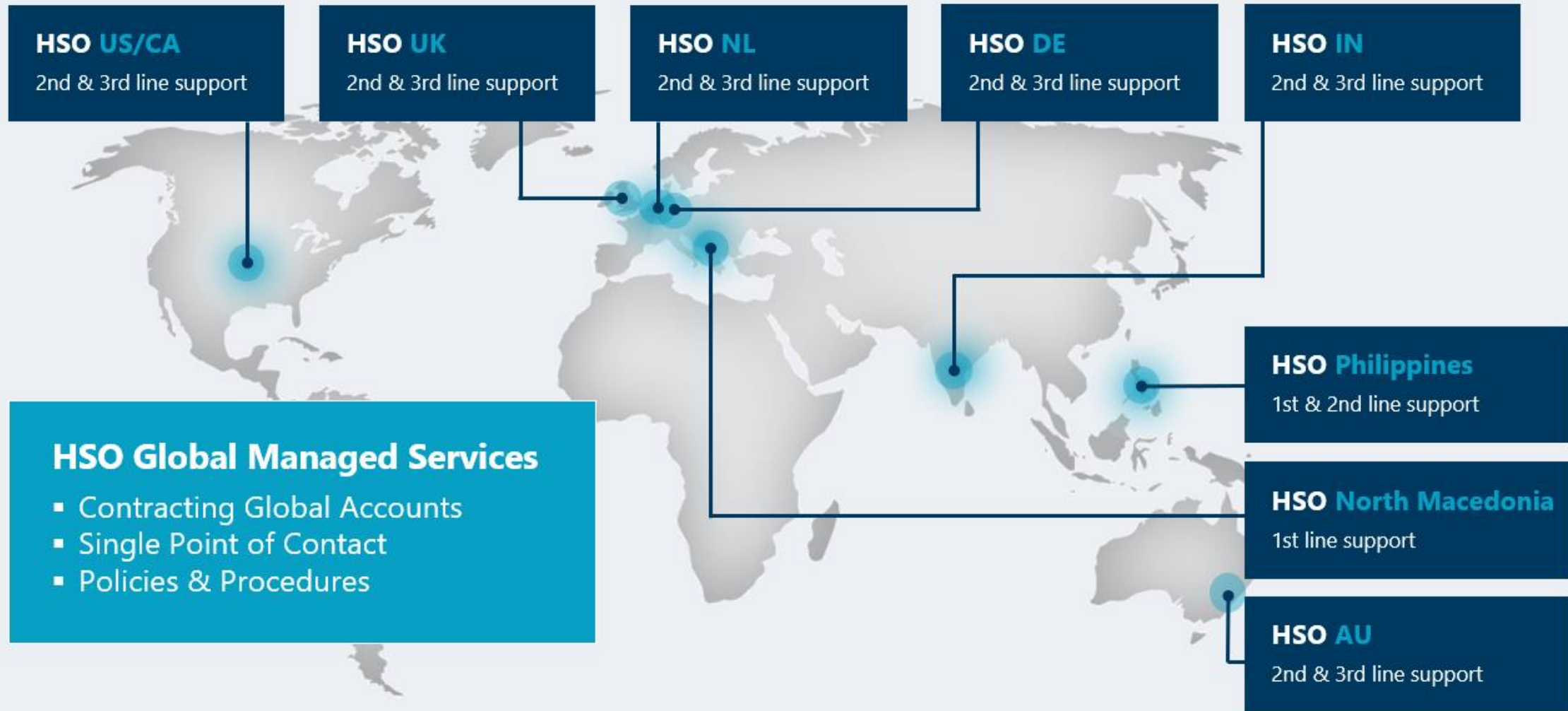


### HSO Academy

Ongoing investment,  
education and  
certification of HSO  
professionals



# HSO Global Managed Services





Microsoft Cloud







Microsoft Partner  
Azure Expert MSP








## Recent Microsoft Awards and Recognition

- 2022 Dynamics 365 Finance  
Partner of the Year Award | Finalist
- 2022 Azure Expert MSP
- 2021 Dynamics 365 Supply Chain Management and Finance  
Partner of the Year Award | Finalist
- 2021 Microsoft Eagle Award  
Winner
- 2020 Modernize Finance and Operations  
Partner of the Year Award | Winner
- 2020 Microsoft Eagle Award  
Winner
- 2020 Connected Field Service  
Partner of the Year Award | Finalist
- 2020 Intelligent Sales and Marketing  
Partner of the Year Award | Finalist
- 2019 Financial Services  
Partner of the Year | Finalist
- 2019 Dynamics 365 Sales  
Partner of the Year | Winner

# Industry Coverage

 FINANCIAL SERVICES	 GOVERNMENT	 MANUFACTURING	 NON-PROFIT	 PROFESSIONAL SERVICES	 RETAIL
Asset Management	Local Government	Discrete Manufacturing	Non-Governmental Organizations	Architecture, Engineering, Construction	Retail
Investment Banking	State/Central Government	Process Manufacturing	Community Based Organizations	Accounting & Consulting	Wholesale Distribution
Insurance	Federal Government	Automotive	Charitable & Membership Organizations	Legal Services	Consumer Goods

# HSO – Microsoft Full Stack Coverage

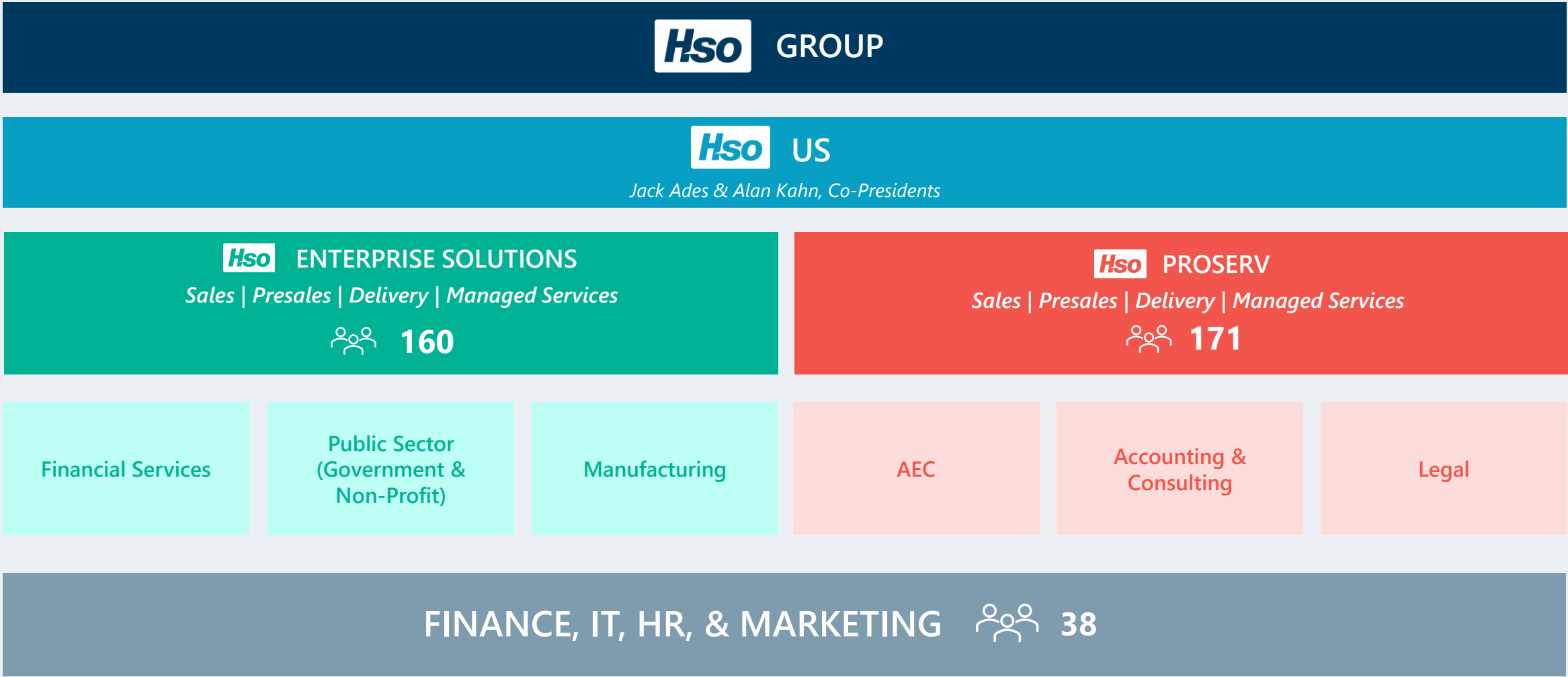
	 Retail	 Manufacturing	 Financial Services	 Public Sector Non Profit	 Professional Services
UO	Microsoft Dynamics 365 Finance   Supply Chain Management   Project Operations   Commerce   Connected Store   Fraud Protection				
CE	Microsoft Dynamics 365 Marketing   Sales   Customer Service   Field Service				
AN	Microsoft Power BI   Azure Data and AI   Dynamics 365 Customer Insights   Product Insights   Sales Insights   Market Insights				
CW	Modern Workplace & Cloud Infrastructure (Microsoft 365, Azure)				
AP	Cloud Transformation   Adoption   Management   Governance   Customer APP Dev Power Platform   Dataverse   Azure Data and App Services				
MS	Applications Management and Support				

## Enable the intelligent data-driven enterprise

- Modernize business operations
- Adopt intelligent automation
- Deliver real-time performance insights
- Connect the enterprise
- Empower your organization



# HSO US Org Structure



# HSO US ES – Senior Management Team

## ES SALES LEADERSHIP & INDUSTRY DIRECTORS



**Kostas Tzigizis**  
*EVP, Sales*



**Jim Bretschneider**  
*EVP, Solutions*



**Tom Berger**  
*VP, Financial Services*



**Jeffrey Beane**  
*Industry Dir., Manufacturing*

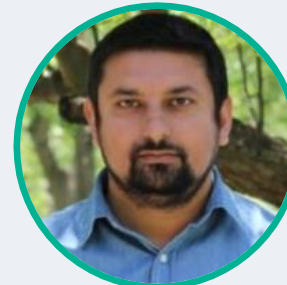
## ES SOLUTION DELIVERY: SERVICE LINE LEADERSHIP



**Manpreet Kalsi**  
*EVP, Professional Services (UO)*



**Michael Quattlebaum**  
*EVP, Consulting (CE)*



**Asad Mahmood**  
*VP, Data Analytics*



**Venkat Rao**  
*VP, Application Platform*

# HSO US ProServ – Senior Management Team

## PS BUSINESS UNIT, SALES & IP LEADERSHIP TEAMS



**Brian Lounds**  
*Business Unit Director*



**Whit McIsaac**  
*Global Industry Director*



**Andy Yeomans**  
*EVP, Sales*



**Sean Skiver**  
*EVP*



**Joe Stuckey**  
*EVP*

## PS SOLUTION DELIVERY: SERVICE LINE LEADERSHIP



**Jen Wisemore**  
*EVP (UO)*



**Darren Gooding**  
*VP, Delivery (CE)*



**Paramesh Varadarajan**  
*VP, Technology*



**Michael D'Alesio**  
*VP, Customer Care*

# HSO US Shared Services

FINANCE & IT  16

HR/TALENT  6

MARKETING  8



**Ben Holtz**  
CFO



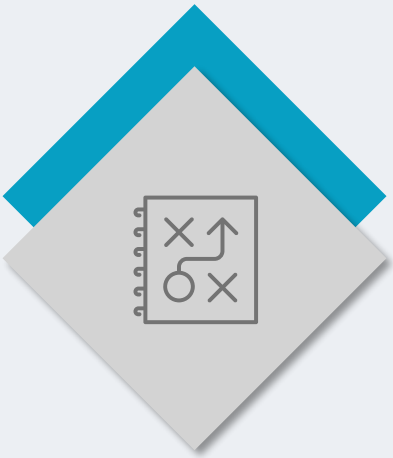
**Kristen Ramerini**  
VP, Human Resources



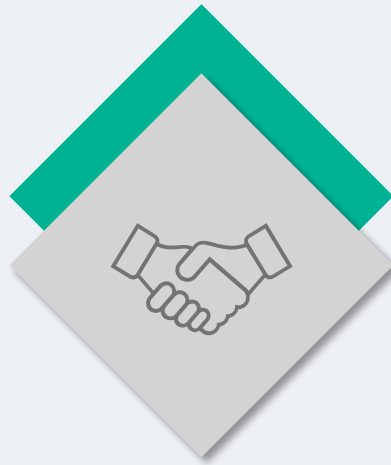
**Amy Spencer**  
VP, Marketing

# How Do Our Teams Interact?

We look for ways to optimize and collaborate across groups



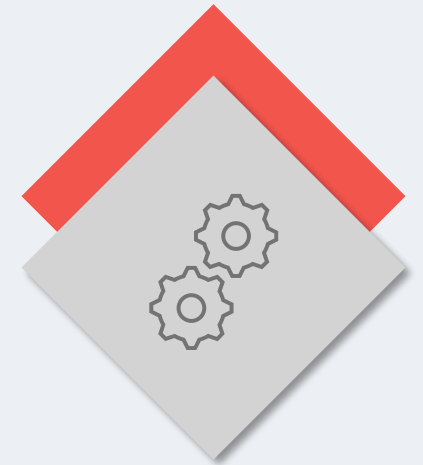
Optimizing for capacity  
and skills (with  
automatic intra-  
company billing)



Share lessons  
learned across  
projects and  
initiatives



Best Practices  
sharing



Sharing product  
knowledge



# Team Engagement & Collaboration Forums

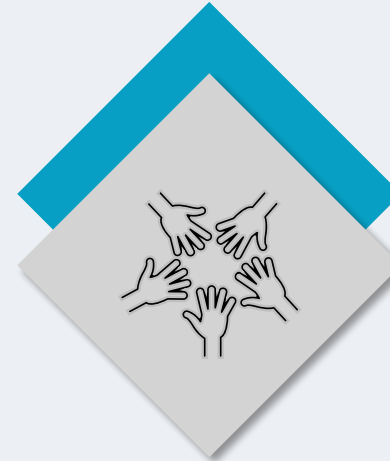


## US Team Company Meetings

- Monthly
- Annual All-Company Meeting in NYC



## Employee Cluster Connect Opportunities (Quarterly)

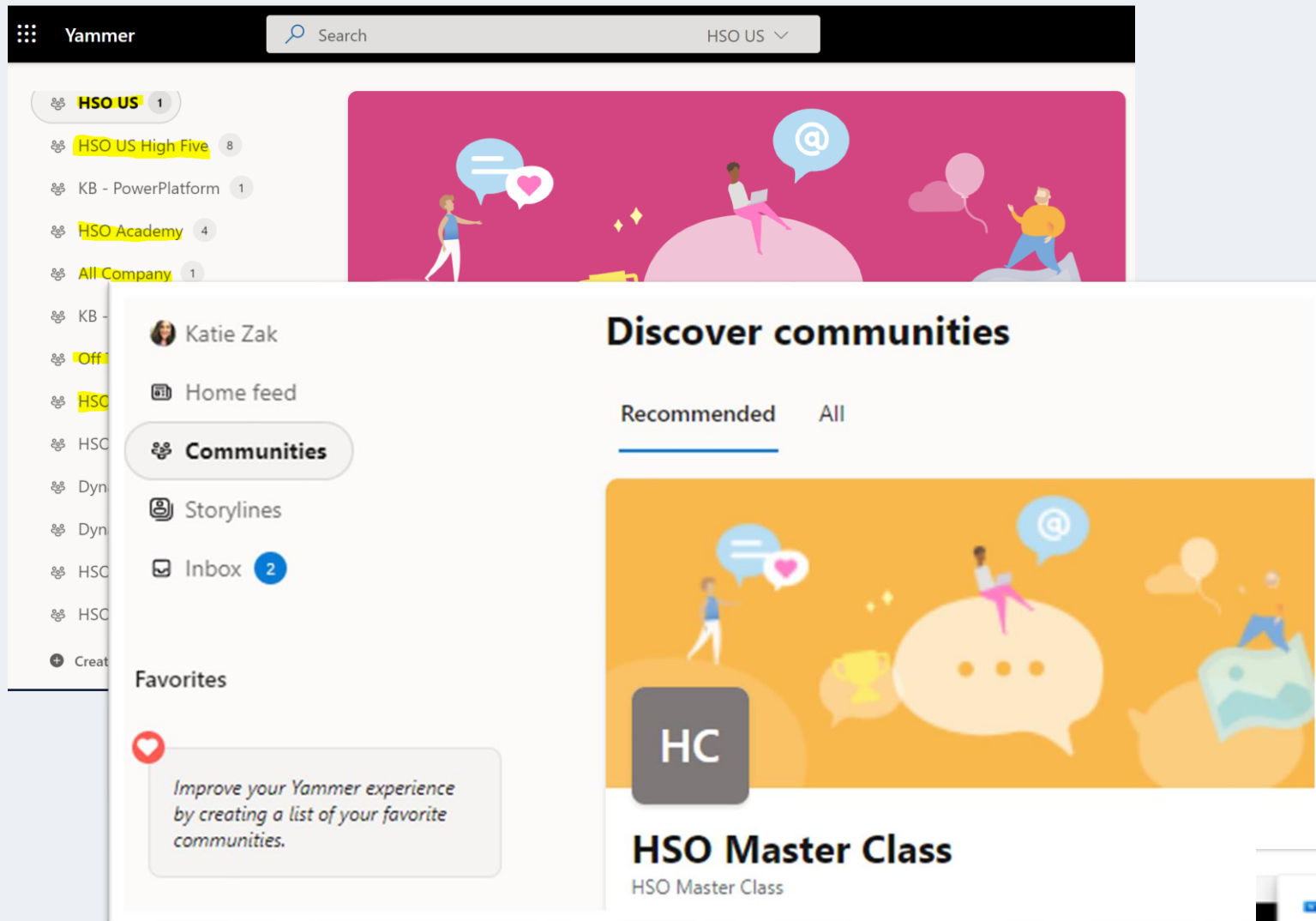


## Team Site Posts (Chat) & Resources



## Yammer Group Communities

# Yammer



## HSD U.S. Groups

- **HSD US – Check Weekly for Updates**
- HSD US High Five
- Off Topic
- HSD ProServ Lounge

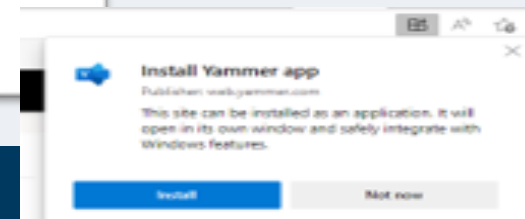
## Global HSD Default Groups

- All Company
- HSD International
- HSD Academy

## Discover Communities of Interest:

- Department Specific Groups
- D365 Product Groups
- KB Groups (ex: verticals)

**Tip: Install the Desktop App!**



# HSO Shared Values



# What's Next?

- All team members receive a custom onboarding plan
- Serves as a centralized help guide to clarify key objectives, deliverables, sessions and team resource links
- If a session is identified as “Self-Review” there will be instructions and links in the meeting invites on how to complete
- Your schedule and/or plan may be subject to change
- Pages 4+ are department/role specific
- Bookmark our HR SharePoint Hub: [Employee Resources - Home \(sharepoint.com\)](https://sharepoint.com)

HR ONBOARDING	PEOPLE	DOCUMENTS AND RESOURCES	DATE & TIME	OBJECTIVES
Essential Documentation Review	Kristen Ramerini	New Hire Documents to be provided through BambooHR.	October 17, 2022, 12pm-1pm EST	<ul style="list-style-type: none"> <li>• Complete BambooHR set-up</li> <li>• Complete new hire paperwork</li> </ul>
Employee Handbook Overview	Self-review	<a href="#">ProServ Employee Handbook</a>	October 17, 2022, 3:30pm-4:30pm EST	<ul style="list-style-type: none"> <li>• Gain understanding of HSO policies</li> </ul>
Travel & Expense Overview	Self-review	<a href="#">T&amp;E Overview (video)</a> <a href="#">Travel &amp; Expense Policy/Resources</a>	October 17, 2022, 4:30pm-5pm EST	<ul style="list-style-type: none"> <li>• Gain understanding of HSO's travel &amp; expense policies</li> </ul>
Benefits Overview	Kristen Ramerini & Ariella D'Urzo	<a href="#">2022-2023 PS Benefits Info Booklet</a>	October 31, 2022, 12pm-1pm EST	<ul style="list-style-type: none"> <li>• Review health insurance options</li> <li>• Review other benefits</li> <li>• Complete benefits enrollment</li> </ul>
Harassment & Discrimination eLearning	Self-review	Instructions included in calendar invite.	October 18, 2022, 11am-12pm EST	<ul style="list-style-type: none"> <li>• Complete required new hire harassment prevention training.</li> </ul>
Introduction to HSO Academy	Self-review	<a href="#">Intro to Academy with HJB (video)</a> <a href="#">Intro to Academy (slides)</a>	October 21, 2022, 10am-11am EST	<ul style="list-style-type: none"> <li>• Learn about resources available to you for your own professional development</li> </ul>
Social Toaster Introduction	Self-Review	<a href="#">Sign up for Social Toaster</a> <a href="#">Sharing Posts Through Email</a>	October 21, 2022, 11am-11:30am EST	<ul style="list-style-type: none"> <li>• Learn about Social Toaster</li> <li>• Understand how HSO leverages employees' digital influence on social media to amplify content.</li> </ul>
Your Guide to Microsoft Certifications	Katie Zak	To be provided during meeting.	October 25, 2022, 3pm-4pm EST	<ul style="list-style-type: none"> <li>• Benefits of becoming a Microsoft Certified Professional</li> <li>• Microsoft Certification Designation Pathways</li> <li>• Live ID Creation and/or Association to HSO Walkthrough</li> <li>• ESI Portal Overview &amp; Study Materials</li> <li>• Exam Tips and Tricks</li> <li>• Q&amp;A</li> </ul>
Performance Management Overview	Katie Zak	To be provided during meeting.	October 28, 2022, 12pm-12:45pm EST	<ul style="list-style-type: none"> <li>• Goals, Objectives, and Components of Performance Management</li> <li>• HSO's Coaching Model</li> <li>• Gain understanding of HSO's Annual Catalytic Coaching process and system</li> <li>• Feedback Collection Processes</li> </ul>

# Onboarding - Important Tasks

- ❑ Yammer Set-Up - [User Guide](#)
- ❑ Set your [Email Signature](#)
- ❑ [Business Card Request](#) (optional)
- ❑ Complete New Hire Documents (in BambooHR)
- ❑ [Internal Systems Portal Review](#)
  - ✓ Bookmark: [HSO US Templates - Home \(sharepoint.com\)](#)
  - ✓ Use the [Requisition Request Form](#) for any supplies you need to successfully perform your job that have not yet been provided to you
- ❑ **Mandatory Harassment & Discrimination eLearning (No action required Feb 2023)**
- ❑ Microsoft Association to HSO
- ❑ LinkedIn Updates
- ❑ Benefits Enrollment (in BambooHR) – *see invite/onboarding plan for session date and time*
- ❑ Employee Experience Survey
- ❑ 30-60-90 Day Check-Ins

*\* Keep an eye out for e-mails and alert notifications on these action items.*



# Who to Contact

- **Helpdesk/Break-Fix Issues**
  - <https://logit.hso.com> (Reference: [Logit Intro Video](#))
  - [HSONAHelpDesk@hso.com](mailto:HSONAHelpDesk@hso.com)
- **Time & Expense Entry in Bnext**
  - Alex Carlock
- **What resources to use and when**
  - Scot Bobo or Alex Carlock
- **Payroll, Benefits Deductions, Expense Reimbursement, VCP Payouts, 401k Contributions**
  - Ariella D'Urzo for payroll, benefits and 401k inquiries
  - Jackie Buccieri for VCP calculations/questions
- **Employee Expense Reimbursements**
  - Kisha Dean and Ariella D'Urzo
- **Employee Programs, Benefits Coverage and Claims Processing**
  - Ariella D'Urzo or Kristen Ramerini
- **General Accounting Questions**
  - Julia Keohan
- **Client/Project Set-Up in Bnext/D365 T&E, Billing Rates, Service Revenue, Collections**
  - Taylor Doucette
- **Software Purchases, Licenses, Subscriptions, Cloud Hosting**
  - Michelle Kirby
- **New Employee Referrals**
  - Brandy DuToit Klocksien, Felicia Davis or Mirela Selimovic
- **New Business Referrals**
  - Petra Eimiller

**TIP: This list is included on the last page of your onboarding plan to refer to.**

# Onboarding Questions?

## **Katie Zak**

Learning & Development Manager

[kzak@hso.com](mailto:kzak@hso.com)

## **Kristen Ramerini**

Vice President, Human Resources

[kramerini@hso.com](mailto:kramerini@hso.com)

(212) 560-5453

## **Ariella D'Urzo**

Payroll & Benefits Manager

[adurzo@hso.com](mailto:adurzo@hso.com)



the results company

Thank you for your  
time and attention!

**Driving  
Improvements  
in Business  
Performance**

