

Case Study: Xero Saves Resources with PlanSource's Benefits and ACA Compliance Technology and Saves Trees with Paperless Open Enrollment

Location: San Francisco, CA | **Industry:** Software | **Employees:** 250 | **Website:** www.xero.com



Founded in 2006 in New Zealand, Xero is one of the fastest-growing SaaS companies globally. Their cloud-based accounting software connects people with the right numbers anytime, anywhere, on any device. Xero helps build a trusted relationship with small business clients through online collaboration, helping over 600,000 subscribers transform the way they do business. Forbes identified Xero as the World's Most Innovative Growth Company in 2014 and 2015.



"PlanSource has quickly become a big part of our benefits strategy. They have made life easier for our Human Resources and Finance teams and have given our employees a much better benefits experience."

Jackie Ward
Vice President of People Experience
Xero USA

CHALLENGE

- Xero used spreadsheets to manage benefits and paper forms for enrollment; it was apparent that they needed technology to streamline their benefits experience
- The company's benefits were not integrated with payroll, creating unnecessary manual work
- With deadlines for the Affordable Care Act looming, Xero required a reliable system to ensure they were compliant
- Employee self-service on an intuitive, online tool was a must to meet the company's objective to eradicate paper, and avoid time-consuming double entry of demographic information

SOLUTION

- Together with their broker, Edgewood Partners Insurance Center, Xero set out to find a benefits technology partner
- Looked at several technology providers in a nationwide search
- Chose PlanSource because of its intuitive user interface, easy, engaging experience, cost-effective pricing model and robust functionality
- Implemented PlanSource's benefits administration solution and ACA compliance tool.
- Integrated the PlanSource benefits system with their payroll provider, ADP

RESULTS

- Xero has eradicated paper and all their benefits are in one place; single sign on allows employees to access benefits directly from their employee portal
- Easy-to-use reporting tools give Xero's HR and finance teams clean information on who is enrolled in what, making payroll deductions and billing reconciliation a snap
- The ACA solution keeps them compliant and allows employees to download 1095-C forms on their own, saving HR teams time (and more trees!)
- Employees have a better understanding of their coverage options and no longer have to enter duplicate data



Zero
Paper



Great
Employee Experience



Worry-free
Compliance

Find out more at www.plansource.com/xero