

Case Studies

Customer success stories that turn real results into proof points for buyers.

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Nichole Adamson
Associate Director Business
Operations — Talent Acquisition

Quick facts

-  **Company:** Chewy, Inc.
-  **Headquarters:** Plantation, Florida and Boston, Massachusetts
-  **Industry:** e-Commerce pet supplies
-  **Established:** 2011
-  **Employees:** 1,500+
-  **Product:** XXX Tax Credits
-  **Website:** investor.chewy.com/overview

Business challenge: Job applicant screening for the Work Opportunity Tax Credit (WOTC) was challenging, with only 43% of applicants completing the necessary questionnaire.

How XXX helped: After implementing the XXX Tax Credit Solution, along with a candidate-friendly prompt and redirect, Chewy now sees a 90-100% WOTC survey completion rate.

Pawsitive ROI: Chewy's WOTC journey to \$1 Million in tax credits

With the mission to be the most trusted and convenient destination for pet parents (and partners) everywhere, Chewy, Inc. views pets and their pet parents as family. Chewy is obsessed with meeting their needs and exceeding customer expectations through every interaction. As an ecommerce pet retailer, the team is constantly striving to find new and better ways to improve their customer experience.

Nichole Adamson is the Associate Director of Business Operations, Talent Acquisition at Chewy. In her role, she serves as Chief of Staff to the Head of Talent Acquisition. She also runs the Project Management Office, which supports the entire talent acquisition organization in driving deliverables and projects to completion.

We recently caught up with Nichole to talk about how the XXX Tax Credits solution helped Chewy receive \$1M in tax credits in 2022. Here is what she had to say:

Low WOTC screening numbers resulted in missed opportunities

We had a very low compliance rate with applicants completing the WOTC questionnaire. We only had a 43% completion rate on WOTC eligibility screening, and we wanted to do much better.

I met with my boss and with colleagues in Tax and HR operations, and everyone was on board to implement the XXX solution for the WOTC tax credits. Based on the scope of knowledge I had with implementations and our different systems, it was a smart move for me to drive the process with the key players that needed to be included.

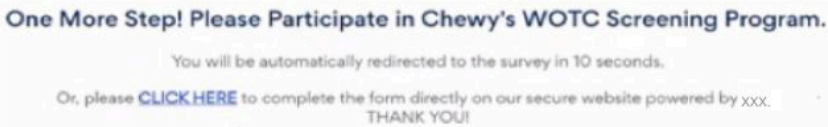
Our XXX Account Manager was very supportive and just as determined to fix the problem as we were. When we asked for case studies to see how other organizations had solved the same problem we were having, he found relevant use cases for us to review in a timely fashion.

Chewy's tail-wagging strategy to increase WOTC survey completion

If you use XXX offering correctly, you're serving so many individuals and our country because you are investing in U.S. job seekers who have traditionally faced barriers to employment (i.e., qualified veterans and long-term unemployment recipients). Our organization gets a return on that investment with diverse talent. There are many benefits to having WOTC integrated into our processes, especially when we're hiring a high volume of employees who qualify for the incentive.

The biggest lever we pulled was modifying our approach to get candidates to complete the survey. We analyzed the entire process to make it easy for candidates to feel comfortable taking the survey, without worrying about anything detrimental happening with their personal data.

We went from "If you want to take this survey, here's the link," to "Please proceed to the next step in the process," and providing the link. That took us from 43% compliance to 65-69%. The second major lever was an automated redirect, which was more technical and required assistance from our tech teams that work on the career site. The wording changed again to:



This redirect prompted another 15-20% increase in responses, bringing us to about a 90-100% completion rate. We experimented with the wording and went through a number of iterations until it was optimal.

I truly believe that the increase in responses has to do with how we captured the survey's sentiment to direct folks to complete it — ensuring that this is just another part of the application process and assigning XXX and the IRS, named on the redirect.

Professional and organizational ROI that deserves a treat

We have about an 80% standard compliance rate, which means we were driving 80% of applicants to the WOTC survey. Of that 80%, 90-100% actually complete the survey. We launched the tax credit solution in June 2022, and we also hired about 30% fewer employees during the same period of time. We expected to see at least a 50% decrease in our WOTC return, but what we saw was \$1 million+ in tax credits in 2022.



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Nichole Adamson
Associate Director Business Operations — Talent Acquisition

This was a major project for me and also a big win across the organization. It's been talked about at high levels, including up to the C-suite, which was very gratifying for me. It showed our ability to overcome something that has resulted in a big return on our investment.

Our purr-fect account manager

Our Account Manager is so nice and so empathetic. He's easy to work with, even though I've asked him for some crazy things. I'm a data person, so I've asked him for projections about what our WOTC would look like in different scenarios, and he's always willing to chase down answers for me. He's in constant communication and is such a great partner.

A willing reference for potential tax credit clients

I am always happy to be a reference for XXX and a subject matter expert for anyone who might be looking at XXX tax credit solution. When you help people who are looking for a solution that you're already using, you also help yourself. I believe in that and it's certainly the way I like to operate.



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Nichole Adamson
Associate Director Business
Operations — Talent Acquisition



Big 5 Sporting Goods takes a game-changing approach to tax credits

Quick facts

-  **Name:** Big 5 Sporting Goods
-  **Industry:** Sporting Goods Retailer
-  **Established:** 1955
-  **Employees:** 9,000
-  **Headquarters:** El Segundo, California
-  **Product:** XXX
Tax Credits

Website: www.big5sportinggoods.com/store/

Business challenge: Work Opportunity Tax Credit ("WOTC") screening was a time-consuming, manual process that often wasn't completed before a candidate received a job offer — a requirement to receive the tax credit.

How XXX helped: After implementing the XXX, the WOTC screening process now takes place when a candidate applies for a job. It is fully automated, saving time and helping Big 5 achieve close to a 100% WOTC screening rate.

Big 5 Sporting Goods is one of America's top retailers of name-brand sporting goods and accessories. Big 5 has 400+ locations spread throughout 10 western states, and the company employs 9,000 workers throughout its retail stores, corporate office and distribution centers.

Johnny Mirador has worked for Big 5 for more than 20 years, starting his career at the store level and working his way up to HR Processes and Practices Manager. In this role, Johnny is responsible for compliance, timekeeping management and administration, and applicant tracking administration, which includes WOTC screening of job applicants. WOTC is a federal tax credit available to employers who hire individuals who have historically faced barriers to employment.

We recently spoke with Johnny about how the XXX solution helped Big 5 to automate the WOTC screening process and Big 5's 10+ year relationship with XXX.

Paper WOTC forms left tax credits short of the goal

Before we automated WOTC screening in 2013, we were using paper 8850 forms for WOTC screening. New hires completed this form along with 10-15 other forms as part of their onboarding at the store level.

Oftentimes, store managers didn't know what the 8850 form was for, so they didn't have new hires to fill them out. Other times, the managers didn't mail them to the corporate office in time, so we would lose tax credit eligibility. It was a very haphazard and manual process.

"The biggest impact of having WOTC automated with XXX is on-time form completion, which drives what we are eligible to receive in terms of tax credits. With 20-30 hires each week and even more during seasonal hiring, it's important that we can receive every tax credit for which we're eligible."



Our long-term partnership with XXX is built on trust. We always get what we need from XXX and the support they give us is phenomenal. We have never had any complaints because the relationship is stress-free, responsive and proactive — characteristics that make a relationship thrive.

Johnny Mirador
HR Processes and
Practices Manager

Automating WOTC screening was a slam dunk

We automated the WOTC screening process with XXX for Tax Credits in 2013, and it made a huge difference. Applicants complete WOTC screening prior to receiving an offer letter. This complies with the requirements for WOTC screening.

Now, we have close to 100% of job applicants completing the questions because the screening is included in the application process. We no longer have to look back to see if forms were completed, and we're compliant in terms of meeting the required dates for WOTC screening.

The biggest impact of having WOTC automated with XXX is on-time applicant screening, which drives what we are eligible to receive in terms of tax credits. With 20-30 hires each week and even more during seasonal hiring, it's important that we can receive every tax credit for which we're eligible.

An account manager who's on the ball

Our account manager is phenomenal. We receive 100% of the answers to our questions immediately. She always follows up or lets us know if we have anything to do on our part. Her responsiveness lets us know that she cares about us as a client and that we matter.

Game on with more time in the day

Having XXX take on the burden of tax credits frees me up to better support our store locations. I'm able to help them with their timekeeping, general HR and applicant tracking system questions. I'm no longer a form collector, which would be a full-time job with the number of new hires we have each week.

A 10-year winning relationship with XXX

Our long-term partnership with XXX is built on trust. We always get what we need from XXX and the support they give us is phenomenal. We have never had any complaints because the relationship is stress-free, responsive and proactive — characteristics that make a relationship thrive. That's what we have with XXX.



SeaWorld makes a splash in payroll innovation with XXX

Quick facts

 **Name:** SeaWorld Parks & Entertainment™

 **Payroll System:** Workfront

 **Industry:** Entertainment

 **Established:** 1973

 **Employees:** 25,000

 **Locations:** 12

 **Headquarters:** Orlando, Florida

 **Product:** XXX

 **Website:** seaworldentertainment.com

Business challenge: SeaWorld experienced challenges trying to electronically pay their J1 Visa employees, who make up about 8% of their workforce as primarily summer employees, because they lacked a bank account that could be utilized in the U.S.

How XXX helped: XXX made it simple and easy to pay their J1 employees, reducing the payroll team's need to pay them via paper checks and removing that burden from their lean three-person payroll team.

SeaWorld Parks & Entertainment™, a leading theme park and entertainment company, provides experiences that matter and inspires guests to protect animals and the wild wonders of our world. The company has 12 park locations and 25,000 employees, the majority of whom are hourly workers.

Angie Maynard is the payroll manager for all SeaWorld locations, working with Crystal Edwards, a payroll administrator, and one other payroll staff member. This lean group of three is responsible for processing payroll, monitoring and answering inbox questions from employees, periodic tax filings, processing wage garnishments and overseeing XXX. They also produce 250,000 W-2 forms each year.

We recently caught up with Angie and Crystal to talk about the company's decision to move from their previous pay card company to XXX pay cards and the impact that has had on their team and their employees. Here's what they had to say in their own words.

Challenges paying J1 Visa employees

We were using another pay card company and there were a lot of problems with employees not receiving their pay and with uploads that weren't being processed. We had to process live printed checks to pay the J1 employees, and the biggest problem was the cost of the checks, the work involved in processing them and then getting them delivered to those employees. We needed to find a solution that could accommodate our employees and relieve our headaches.

XXX pay card to the rescue!

We've had the XXX pay card since early 2021. Many J1s can't receive traditional direct deposit because they don't have bank accounts, so the XXX pay card makes it simple and easy for us to pay them. With XXX, we can ensure that these workers can be paid accurately and on time.

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If you want your employees to have easy access to their pay, help reduce your payroll team's workload and save your company money — you owe it to yourself to look at XXX. It does all three while providing a user-friendly experience with employee self-service access to pay records and history.”

Crystal Edwards,
Payroll Administrator

Since every one of our 12 parks employs J1 Visa workers, this solution works extremely well — for our employees and for our company. We have many of our other 24,000 hourly employees using XXX as well to receive their pay. Any employee who wants a XXX card can have one. The human resources department at each location maintains a stack of cards that employees can choose to use when they are onboarded, or whenever they have a problem with a direct deposit so they can gain immediate access to their pay.

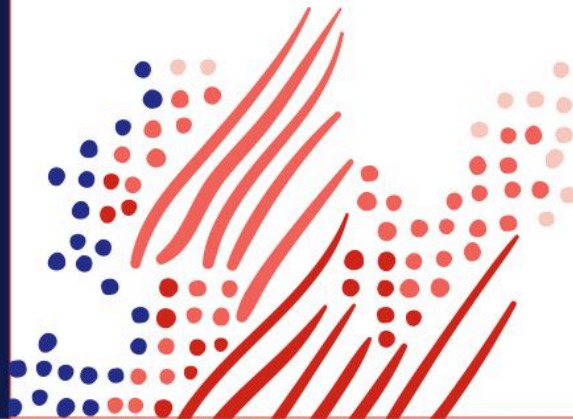
A positive employee pay experience

Our employees love the XXX pay card. We offer it to every new hire, along with options for direct deposit and paper checks. Employees find it easy to use and love the fact that they can get their pay on their card right away on payday. They just go to HR at their location to get a card. We can also make payments other than for payroll on the XXX card, such as PTO that wasn't entered properly.

We had a salaried employee who had a problem with a direct deposit because he entered the wrong bank information, and he was thrilled that he could get his pay immediately with the XXX card.

An account rep who's a trusted advisor

Our XXX account manager is amazing. She trained us when we first implemented XXX, and the process was smooth and easy. We have a wonderful relationship and talk often. We can always count on her to be there whenever we need her assistance.





Bringing in fresh expertise on ACA compliance

Quick facts

-  **Name:** Yoke's Foods, Inc.
-  **Payroll system:** XXX
-  **Industry:** Retail Grocer
-  **Established:** 1946
-  **Associates:** 1,850
-  **Locations:** 19 locations throughout Washington, Idaho and Montana
-  **Headquarters:** Spokane, Washington
-  **Product:** XXX
Health Compliance
-  **Website:** yokesfreshmarkets.com

Yoke's Foods is a 100% associate-owned neighborhood grocer that sources fresh local products from area farms. Yoke's focuses on the environment, finding innovative ways to offer a greener shopping experience, and helping customers live their lives eating the freshest foods. Kailey Jones, Benefits Administrator, has been with Yoke's Foods for four years as part of the four-member HR team. She is responsible for benefits, leaves of absence, open enrollment and ACA compliance for Yoke's 1,850 associates.

Business challenges

- Not knowing what was needed to comply with ACA employer-shared responsibility provisions
- Keeping track of associates' healthcare eligibility
- Inaccurate 1095-C forms that listed all associates as full-time even when they weren't

The HR team didn't know what they didn't know

When Kailey first started at Yoke's Foods, she and the other HR team members used the XXX platform and spreadsheets to determine who was full-time and eligible for healthcare benefits. This made her extremely nervous because she was concerned about the penalties they might incur for non-compliance with the ACA mandates.

"Before we had the XXX solution, we didn't know that we needed to change associates from full-time to part-time for ACA purposes when their status changed. Simply put, with a variable-hour workforce, tracking their full-time or part-time status as it related to the ACA was extremely difficult. As a result, we were concerned about how accurate our reporting was flowing through to our 1095-C forms."

1095-C forms listed associates as full-time; however, they may not necessarily have received healthcare benefits offers because they were difficult to track.

"Now I feel that all our forms are correct. Our associates' actual working hours can vary from week to week. Most of our associates are full-time, but it depends on the needs of the job and what types of hours they want to work. We have 60 salaried associates and 1,200 hourly associates who are benefit-eligible right now — but it can vary from year to year."

Tracking all that was a nightmare for Kailey before Yoke's implemented the XXX Health Compliance module. Now, Kailey feels confident that all her data is clean. She uses the technology's dashboard to see potential penalties and quickly resolves what's causing them, so she has no worries about potentially getting a penalty.

Saving time and reducing dependence on spreadsheets

Before implementing the XXX solution, Kailey could easily spend days each month trying to determine associate eligibility for benefits. Now, she logs into the dashboard to pull a list of eligible associates.

"The labor savings alone are worth the cost of the product. The dashboard provides instant results about who's newly eligible, and I no longer need to spend days working on spreadsheets to figure it all out."

Each month, Kailey only needs to spend 15 minutes on the phone with her service representative, discussing forms that might need to be edited and any potential penalties that she should be aware of.

"I love that we have monthly calls rather than waiting until year-end. This way, I'm assured that we will stay on track and there won't be any surprises at the end of the year. I have confidence that we won't receive any penalties, and even if we did, XXX would help us resolve it."

Trust now that their data is clean

Approximately 170 data points need to be considered to ensure ACA compliance. Kailey feels confident that the company's data is correct. She knows she doesn't have to worry every week because of the seamless integration. Knowing that XXX helps Yoke's handle compliance with the ACA employer-shared responsibility mandate produces far fewer headaches for her.

Advising peers about the benefits of XXX Health Compliance

"If ACA compliance is on your mind and you have to remind yourself to deal with it in your calendar every month and at the end of every year, understand that I don't have to do that. It's no longer on my plate. XXX helps me with it, and my service representative walks me through the process step-by-step. It's a weight off my shoulders not to worry about ACA compliance."

Kailey repeatedly said that XXX gives her confidence in her ability to remain ACA compliant. She doesn't worry about penalties, and that's a major relief for her.

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I love that we have monthly calls rather than waiting until year-end. This way, I'm assured that we will stay on track and there won't be any surprises at the end of the year. I have confidence that we won't receive any penalties, and even if we were to, XXX would help us resolve it."

—Kailey Jones,
Benefits Administrator