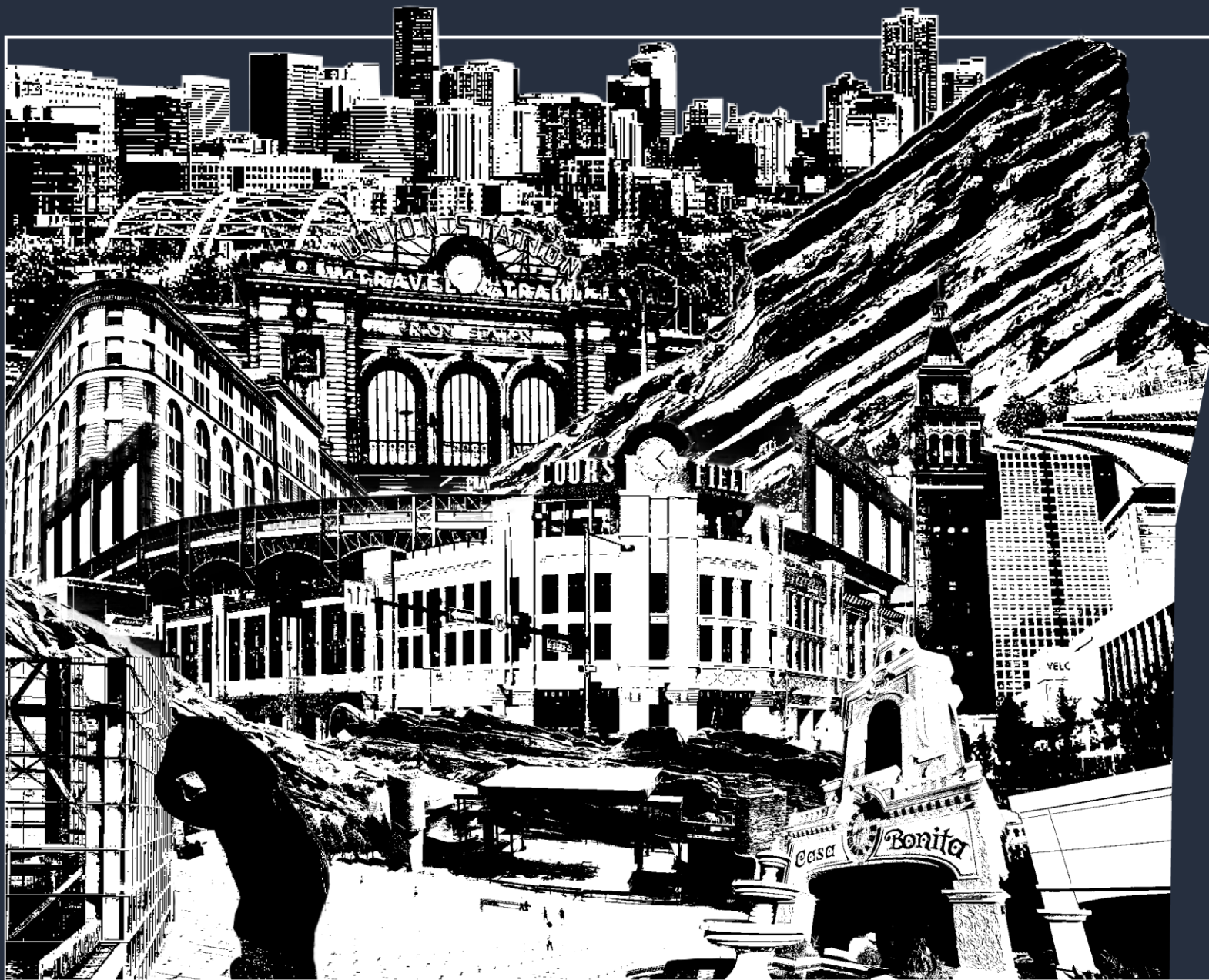




WELCOME TO



SUNDAY, JUNE 14

DENVER, CO

RESOURCE PAGE



swipeclock

PARTNER PROGRAM ▾

MARKETPLACE

RESOURCES ▾

BECOME A PARTNER

LOGIN ABOUT US ▾

Your Base Camp Live Resources



Thanks for Attending!

We hope you enjoyed our latest Base Camp Live event. Stay up-to-date with Swipeclock news and updates using the resources below.



We Do Partnership Better.





INTRODUCTIONS

CUSTOMER SUCCESS

- Holly Heldt – Director of Customer Success
- Geoff Blomquist– Director of Channel Dev

PrismHR

- Erin Poole – Partner Strategy, PrismHR

MARKETING

- Christopher Swan – Partner Strategy
- Lauren DeSimone – Events
- Cary Snowden – Strategic Partner Marketing



AGENDA

- 02:00 | Welcome — Cary Snowden | **[You Are Here]**
- 02:05 | View from the Top — Holly Heldt
- 02:25 | Scout Report — Erin Poole
- 02:35 | Trail Review — Geoff Blomquist
- 03:15 | Program Updates — Geoff Blomquist
- 03:25 | Camp Operations Workshop — Chris Swan
- 03:40 | Open Mic Q&A — Holly, Geoff, Chris, Cary
- 03:55 | Wrap up — Cary Snowden
- 04:00 | Ending of Meeting

VIEW FROM THE TOP

Holly Heldt



MARKET LANDSCAPE: SHAPING OUR ROADMAP



FOUR MACRO SHIFTS SHAPING BUYER PRIORITIES



Automation pressure
40% manual

Deloitte Payroll Benchmarking Report, 2025



Regulatory
Complexity



Talent shortages
Gaps for 83%

CFO Pulse Survey 2024 AACSB; BLS Occupational Outlook 2025



Advisory services shift
60% prioritize

CPA.com & AICPA Business Development Committee Report, 2024

More complexity + fewer people + manual processes = higher risk.

ONE ECOSYSTEM. THREE RELATIONSHIPS.

Firm / Bureau

Manages compliance, multi-client payroll, filings, & employer billing across their entire book of business

Employer

Runs payroll, manages workforce scheduling and time, stays compliant across jurisdictions

Employee

Clocks in, tracks time, requests PTO, and gets paid on time, every time

SHAPING THE NEXT CHAPTER OF SWIPECLOCK

Driven by customer needs and market trends.

COMPLIANCE

9%

Regulatory requirements that create risk if unaddressed. Non-negotiable.

MAINTENANCE

42%

Problems that appear across many customers. High-frequency pain that erodes trust if left unaddressed.

NET NEW

49%

Capabilities that close competitive gaps, unlock new segments, or extend what customers can do on the platform.

HOW IS AI SHAPING WHAT WE DO?

Product:

AI-Enhanced Product Decisions
Smarter Insights
Building the Foundation

Development:

AI-Assisted Development
Enhanced Testing & Automation
Faster Delivery

Support:

Scripting Bot (Validation, Writing, Testing)



ROADMAP THEMES

Accuracy
& Trust

Efficiency
at Scale

Workforce
Visibility

Room to
Grow

ROADMAP ALIGNMENT

Accuracy & Trust

- Integrations & Payroll Sync Enhancements
- Employee Directory Data Visibility
- OKTA Security

Efficiency and Scale

- Web clock enhancements
- Core Timecard, PTO, Scheduling Workflow Enhancements

ROADMAP ALIGNMENT

Workforce Visibility

- Offline Mobile & Geofence
- New Platform integration

Room to Grow

- Moving WFH sites to other providers

PRODUCT ENHANCEMENT TIMELINES

MAY – JULY

- Employee Dashboard
- WorkforceHub Certifications: credential tracking & enforcement at position level
- Expanded Scheduling APIs

Marketing Content:



- Supports healthcare vertical guide. Aligns with "Certifications" epic
- Supports hospitality vertical and integration enhancements.
- Scheduling APIs enables WFH schedule enforcement for hotels.

PRODUCT ENHANCEMENT TIMELINES

AUGUST – OCTOBER

- WebClock - PIN-based clock-in decoupled from employee portal (WFH)
- Dashboard by Persona - role-based dashboards for managers, employees, admins (WFH)
- Apex-WFH Advanced Integration Phase 2

Marketing Content:



- Product blog for hospitality/retail/construction.
- Competitive response to Homebase/Connecteam kiosks
- Supports "From Time Tracking to Workforce Intelligence" narrative. Surfaces key tasks & insights by role

BEYOND THE PRODUCT

Scheduled Product Cadence

Stay ahead of upcoming enhancements with regular product updates and release visibility.

Marquee Webinars

Iris led flagship live events focused on market trends, customer challenges, and growth opportunities.

Marquee Guides

Quarterly downloadable resources packed with insights, talking points, and customer-ready content.

Campaign Hero

Featured tools, calculators, and resources designed to spark customer conversations and drive engagement.

Supporting Content

Blogs, educational materials, and shareable assets to keep your teams informed throughout the quarters

Key Milestones

Important dates and initiative timelines to help you plan ahead and maximize upcoming opportunities.

SCOUT REPORT

Erin Poole, PrismHR



WORKING TOGETHER

We Do Partnership Better



- A strong, proven partnership
- Aligned goals and priorities
- A shared commitment to partner success
- Continued investment in our future together

TRAIL REVIEW

Geoff Blomquist



MULTI-COMPANY UPDATES

New improvements

- Gives Client Admins access to manage multiple sites from one place.

• Timecards

- Edit
- Approve

• PTO

- Manage requests
- View calendar
- Run balance reports
- Adjust balances

• Reports & Payroll

- Run reports
- Complete Payroll Review

• Schedules

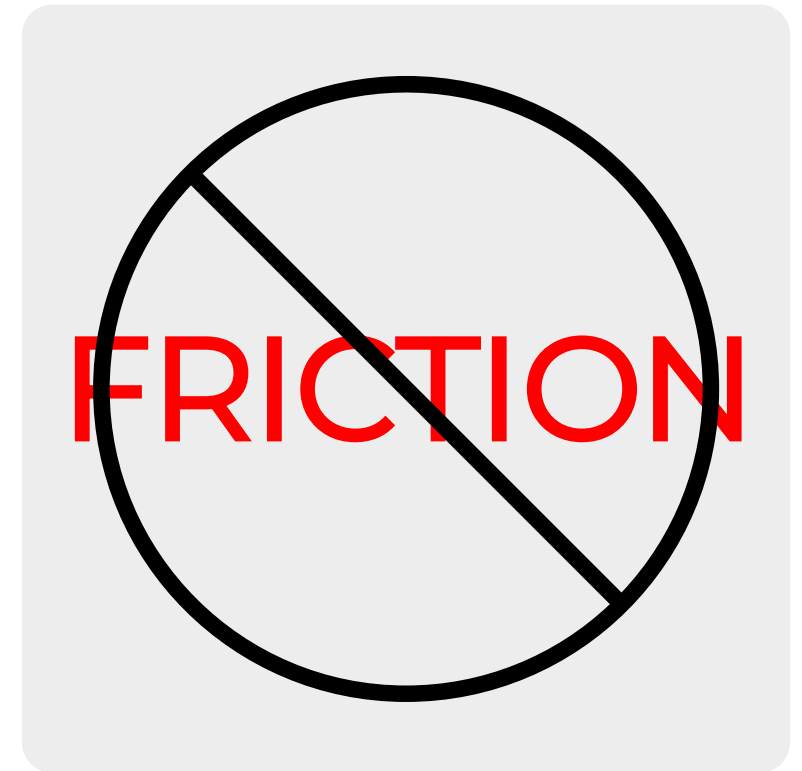
- Create and manage
- View and approve swaps



THE NEW EMPLOYEE DASHBOARD

Why it matters – pain points we address

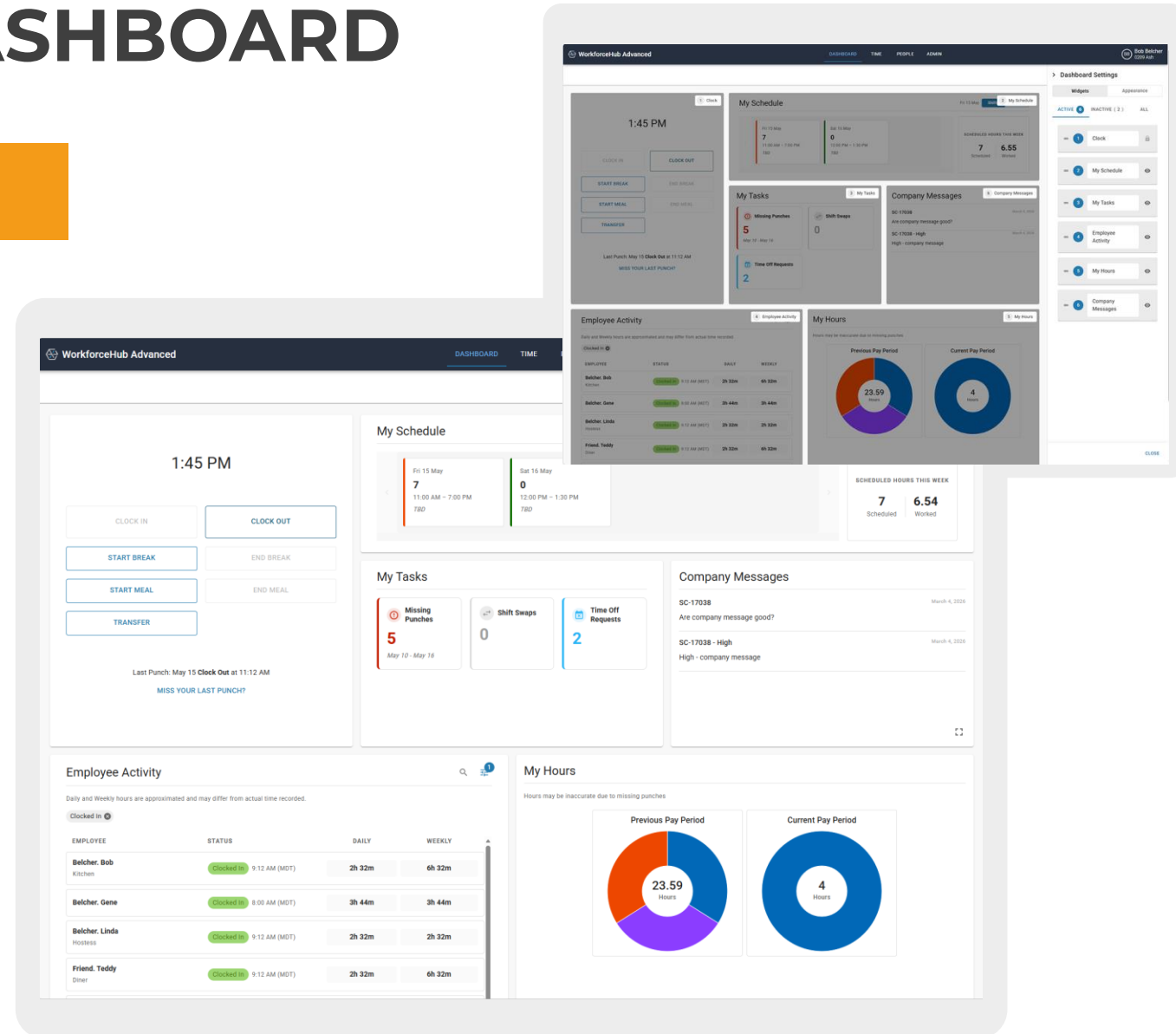
- Users waste time jumping between screens
- Managers miss approvals and exceptions
- Employees need easier access to schedules, hours, and PTO
- The platform should feel simpler from the first login



THE NEW EMPLOYEE DASHBOARD

What's new?

- Personalized dashboard by role
- Customizable widgets
- Multiple layout options
- Saved user preferences between sessions





DEMO

- New site add
- Multi Site Admin
- Dashboard
- Scripting Bot

THE NEW EMPLOYEE DASHBOARD

Messaging

The new Dashboard gives each user a clearer starting point in WorkforceHub, with role-based widgets that focus the information and tasks they need most.

It is customizable, easy to use, and designed to help teams spend less time navigating and more time getting work done.

PARTNER UPDATES

Geoff Blomquist



MID-YEAR REMINDER: RESELLER PARTNER TIERS

TIER	ACTIVE SITES	HARDWARE DISCOUNT
Allied	80+	25%
Certified	40-79	10%
Associated	11-39	0%
Recommender	0-10	0%

ANNUAL ASSESSMENT

At the beginning of each year, partner tiers are reassessed based on the previous year's active sites activity and overall participation. This review ensures each partner's tier accurately reflects their current level of engagement in the program.

*This change was implemented Jan 1, 2026

PARTNER TECHNICAL TRAINING CLASSES

Coming Soon!

Category	Training Title	Description
Reporting	Reporting Essentials (PBJ, Custom, General)	Covers PBJ submission, standard/custom reports, and key reporting workflows for client management.
Clock Prompts & Functions	Optimizing Time Capture	Setup and use of prompts, department/job capture, and troubleshooting to reduce manual edits.
Scripting	Advanced Scripting Overview	Review of accruals, shift differentials, pay rules, and scripting logic; includes common examples and configuration guidance.
	Scripting Lab (Use-Case Focused)	Hands-on review of partner or client-specific scripting scenarios and advanced rule setup.
Hardware	Clock Setup & Troubleshooting	Hardware options, setup best practices, connectivity, and troubleshooting for client sites.
Integrations	Payroll Integration Deep Dive	Data mapping, sync setup, and troubleshooting for supported payroll integrations



CAMP OPERATIONS WORKSHOP

Chris Swan



LET'S TALK ABOUT FRICTION

If your job is to produce payroll, **friction** is anything that makes work harder, slower, riskier, or more confusing than it should be.



What Is Payroll Friction?



Late or missing timecards

Payroll waits on incomplete data



Manual corrections every pay period

Rework that repeats indefinitely



Overtime surprises

Costs incurred before anyone notices



Scheduling chaos

Downstream payroll variability



Spreadsheets and paper

Manual data entry into payroll

The most important insight:

Payroll friction almost always originates upstream — in how time is collected, approved, and tracked before payroll begins.

WorkforceHub gives clients control at the source.



FRICTION RESULTS IN:

OPERATIONAL DRAG

Interrupts workflow

INCREASED ERRORS

Distracts focus

COMPLIANCE
INFRACTIONS

Facilitates workarounds

LOWER CLIENT
SATISFACTION

Reduces time for care

INHIBITS SCALABILITY

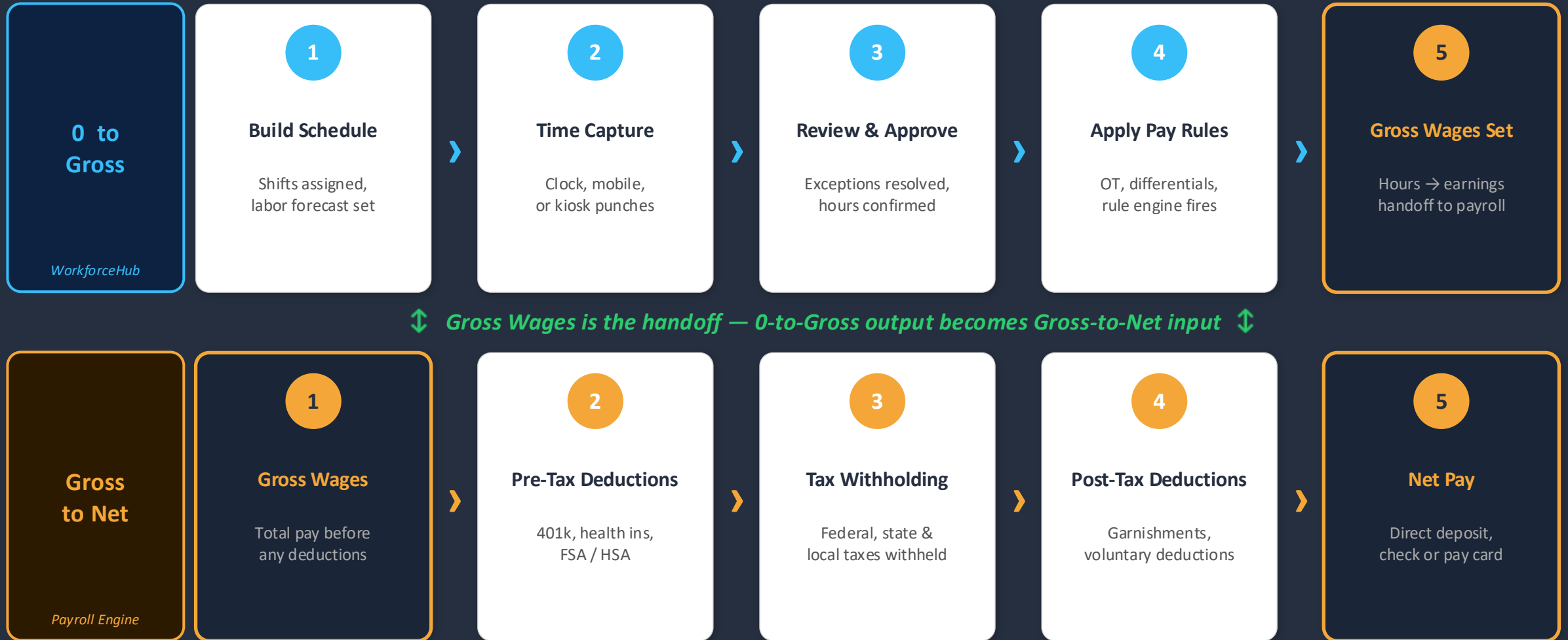
Limits contributor productivity

GENERATES
MISALIGNMENT

Disconnects client relations

Payroll Workflow Overview

How 0 to Gross and Gross to Net connect to produce payroll



PAYROLL IS DOWNSTREAM

Friction is created upstream

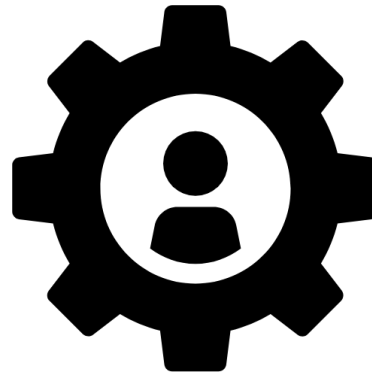
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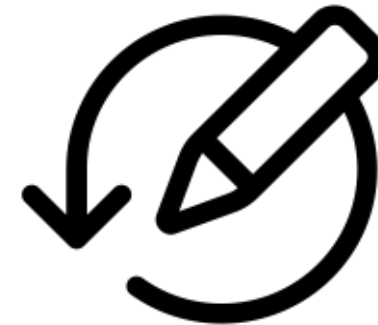
Mgr. Edits



Adjustments



Corrections



Document



Every handoff is a chance to introduce **risk**.

Payroll Friction Lands on Your Team



Friction starts inside your client's workforce process. The downstream pain lands on your payroll team.

CLIENT FRICTION	WHAT IT COSTS YOUR TEAM
Payroll errors and disputes	More correction requests = lower margin per client
Overtime surprises	Reactive firefighting instead of consultative value
Manual timekeeping	Your team absorbs the manual labor clients should own
Late manager approvals	Payroll delays → client calls → escalations → lost trust
Spreadsheet-based tracking	Data errors your team gets blamed for
Compliance exposure	Compliance pressure that sits on your desk, not theirs
Employee dissatisfaction	Silent churn — they leave before you know there's a problem

Payroll Friction Has a Real Cost



1 in 5

U.S. payrolls
hold errors

\$291

Average cost
per payroll error

15

Corrections per
pay period on average

\$78,700

Annual cost per 1,000
employees — missed punches

64%

Of workers feel financial
stress from payroll errors

53%

Would consider leaving
if problems continued

Source: EY Payroll Research · HiBob · HR Dive

The Cost of One Client's Payroll Friction

Example scenario — a client with recurring payroll friction every pay period:

Corrections per pay period	15
Average cost per correction	\$291
Pay periods per year	26
Estimated annual impact	\$113,490

15 corrections × \$291 × 26 pay periods = \$113,490 annually

Your team absorbs this friction as correction requests, delayed payrolls, and reactive client calls — often without recognizing the upstream cause.

Payroll Friction Is an Upstream Problem

DOWNSTREAM SYMPTOM	UPSTREAM CAUSE	WORKFORCEHUB CONTROL POINT
Payroll corrections	Missed punches / manual time edits	Time capture + audit trails
Payroll delays	Late approvals	Manager workflows
Overtime complaints	Lack of real-time visibility	Overtime alerts + scheduling
Client frustration	Manual, inconsistent process	Centralized workforce data
Compliance anxiety	Poor documentation	Digital records + approval history
Service burden	Payroll team cleaning up client data	Payroll-ready time data

Friction shows up at the end of the process. The root cause always starts earlier — where time is worked, tracked, and approved.

How WorkforceHub Creates Business Value



Payroll Efficiency

Cleaner time data makes payroll faster, more accurate, and easier to process. Fewer corrections, fewer delays.



Labor Cost Visibility

Overtime alerts and scheduling tools give managers visibility before costs are incurred, not after payroll closes.



Compliance Support

Digital records, audit trails, and approval history replace fragmented manual processes with consistent documentation.



Client Retention

Clients who solve operational issues through your relationship become more loyal. You become an advisor, not just a processor.

Your Clients Are Telling You They Need WorkforceHub

Are You Listening?



PARTNER REFERRAL
ENABLEMENT



THE RESULT

Operational Sanity

Fewer corrections, off-cycle runs, and crisis escalations

Margin Expansion

Attach revenue without proportional payroll headcount

Churn Insurance

Embedded workflows increase "pain of exit"

Defensible Compliance

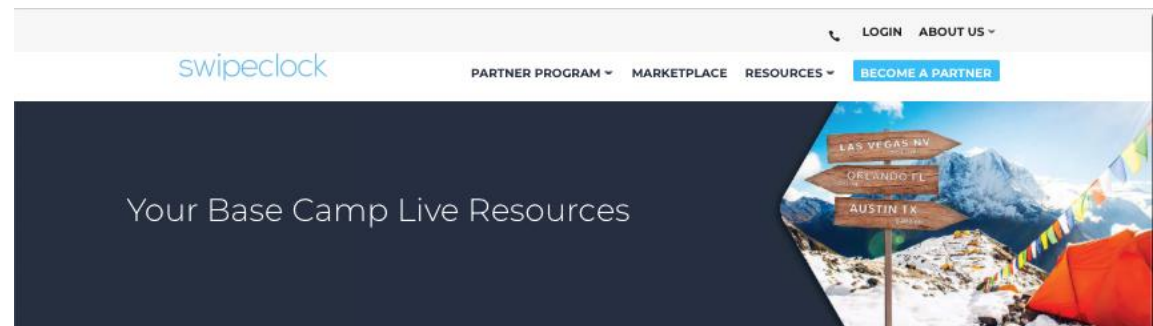
Audit-ready records and earlier risk detection

OPEN MIC Q&A

Geoff | Holly | Cary



RESOURCE PAGE



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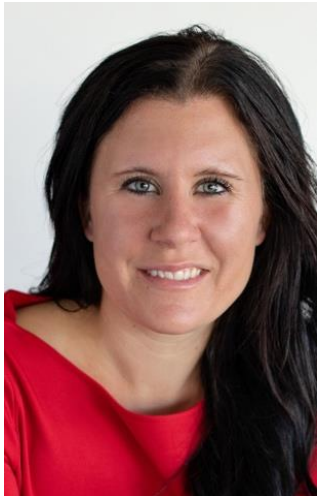
We Do Partnership Better.



WE'RE HERE TO HELP YOU SUCCEED!

Your Account Manager Team

Reach out with your questions!



Holly
hheldt@



Kenzie
kcroft@



Reagan
rweaver@



Geoff
gblomquist@



Heather
hallen@



Jake
Jake.hawley@

INTERESTED IN PARTNERSHIP?

Three flexible partner programs

- **Alex Mohammed**

Swipeclock Partner Relationship Manager

amohammed@swipeclock.com

801.301.1096





swipeclock

SUMMIT'26

OCTOBER 22

REGISTRATION NOW OPEN



26

R 22

EN



QUESTIONS?



THANK YOU

THANK YOU FOR JOINING US!

See you at the Summit!
October 22 Online

