



Implementation Services

CONSULTATIVE PLAN

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Consultative Implementation

Your Implementation Manager will help you set up your Rippling products, walk you through key experiences, and help you configure and learn how to get the most out of your Rippling system.

The Rippling implementation method

At every stage of the process, we are committed to supporting you, whether it's onboarding and offboarding your first employee, executing payroll runs, or ensuring smooth Open Enrollment or Benefit Transfers. Our objective is for you to exit Implementation equipped to continually configure and update Rippling to align with your specific business processes in HR, Finance, IT—or all three.

Our implementation process is seamlessly integrated into the product, backed by a dedicated team of Implementation managers, and supplemented by free

training resources. Our aim is to make this exciting and occasionally overwhelming journey manageable and streamlined. This brochure shares a typical timeline for customers implementing all Rippling products (note that your experience may vary based on the number of products and complexity of your organization) and outlines the roles and responsibilities of both Rippling and the customer in each product area.

We're thrilled to partner with you on your Rippling journey!

Our goal

Teach you how to customize Rippling to your organization's needs—even after Implementation is complete so you can continually make adjustments when needed.

Implementation Steps

- 1 **Configure Rippling Unity**
- 2 **Set up payroll**
- 3 **Set up time tracking**
- 4 **Set up benefits and insurance**
- 5 **Set up app and device management**
- 6 **Run your first payroll on Rippling**

Our implementation process



Discover

Rippling will review your company processes in order to effectively help you configure the Rippling platform to align with your specific requirements.



Learn

Complete Product Training Courses on [Rippling U](#) to acquire fundamental knowledge about the Rippling platform.



Guide

We'll provide comprehensive support and guidance through dedicated calls and detailed documentation, particularly for complex one-time setup areas such as Payroll and Benefits. We'll act as your mentor throughout the implementation process, helping you configure Rippling and teaching you how to customize various aspects so you can confidently implement changes in the future.



Review

During the entire process, you will have regular meetings with your dedicated Implementation Manager to review progress and address any questions that may arise.



Take advantage of our self-paced on-demand courses available on [Rippling U](#), explore our [Help Center](#) for product user guides and tutorials, attend live product training webinars, and earn your Rippling certification to enhance your knowledge and expertise.

Typical Timeline

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6
MILESTONES	KICKOFF CALL <ul style="list-style-type: none"> Product Discovery Review Project Plan Alignment 	UNITY CALL <ul style="list-style-type: none"> Company Set Up Review (Census Support) Onboarding & offboarding walk-thru ASO Initial Set-Up Review 	PAYROLL CALL <ul style="list-style-type: none"> Payroll Installation Review ASO Tax Account Review Global Payroll Installation Call 	BENEFITS CALL & RECRUITING <ul style="list-style-type: none"> Insurance App Installation Review Flex Benefits Installation Review COBRA/ACA ASO Benefits Review (Workers Comp) Review Global Benefits Call Recruiting starts 	TIME TRACKING <ul style="list-style-type: none"> T&A Installation Review Time Off Installation Review Payroll Preparation Support 	IT CALL <ul style="list-style-type: none"> App Integration Installation Device Management Review / Launch
Rippling Guided Rippling will support the customer with guided calls and coaching to help them implement Rippling products to their needed specifications.						
PRODUCTS	COMPANY SETUP ASO US PAYROLL BENEFITS GLOBAL BENEFITS GLOBAL PAYROLL EOR T&A IT: APP MGMT IT: DEVICE MGMT IT: INVENTORY MGMT	COMPANY SETUP ASO	US PAYROLL ASO GLOBAL BENEFITS EOR	ASO BENEFITS EOR TALENT: RECRUITING	T&A TALENT: RECRUITING	GLOBAL BENEFITS TALENT: RECRUITING IT: APP MGMT IT: DEVICE MGMT IT: INVENTORY MGMT
Self Guided Customers will use RipplingU & Help Center resources to implement Rippling themselves.						
PRODUCTS		UNITY AUTOMATION HR HELP DESK TALENT: LEARNING MGMT TALENT: PULSE TALENT: HEADCOUNT TALENT: PERFORMANCE MGMT GLOBAL CONTRACTORS		E-VERIFY 401K INTEGRATION EDI ONEMEDICAL	LEAVE MANAGEMENT	API ACCESS AZURE OKTA SENTINEL ONE



Typical Timeline

Continued

	WEEK 7	WEEK 8	WEEK 9	WEEK 10	WEEK 11	WEEK 12
MILESTONES	PAYROLL PROCESSING <ul style="list-style-type: none"> Payroll Processing (First Check Date) Global Payroll Processing 	CORE IMPLEMENTATION WRAP-UP <ul style="list-style-type: none"> Implementation Checklist Completion Review Prep for continued support team (Technical Account Managers & Account Manager) and full Rippling product launch 	SPEND & AUTOMATION CALL(S) <ul style="list-style-type: none"> Spend Onboarding Call(s) start if monthly spend > \$25K Automation Call(s) start if \$5K Unity Automation Add On is purchased 	AUTOMATION DISCOVERY CALLS <ul style="list-style-type: none"> Workflows, Approvals, Formulas, Reports, & Permissions 	SPEND & AUTOMATION CALL(S) <ul style="list-style-type: none"> Spend: Launch & End User Training Automation: Review & Training 	SPEND & AUTOMATION CALL(S) <ul style="list-style-type: none"> Spend: Success Review Automation: Wrap Up
Rippling Guided Rippling will support the customer with guided calls and coaching to help them implement Rippling products to their needed specifications.						
PRODUCTS	US PAYROLL GLOBAL PAYROLL GLOBAL BENEFITS T&A TALENT: RECRUITING	ASO	UNITY AUTOMATION (\$5K ADD ON) SPEND MANAGEMENT	UNITY AUTOMATION (\$5K ADD ON) SPEND MANAGEMENT	UNITY AUTOMATION (\$5K ADD ON) SPEND MANAGEMENT	UNITY AUTOMATION (\$5K ADD ON) SPEND MANAGEMENT
Self Guided Customers will use RipplingU & Help Center resources to implement Rippling themselves.						
PRODUCTS			UNITY AUTOMATION			



Company Setup

Unity

YOUR RIPPLING PARTNERS

Implementation Manager

TIMING

1-2 weeks

TOTAL EXPECTED CUSTOMER TIME

~8-10 hours

COMPLETION MILESTONES

1. Every paid employee for the current year is found in Rippling.
2. Every W2 Employee has a time off policy associated with them - be it a weekend policy, holiday policy, working hours policy, etc.



KEY MEETINGS

Company Setup (Census)	Discuss and review the Employee Census data.	30 min
Onboarding & Offboarding	Introduction to Unity: onboarding/offboarding process (e.g. Company settings, I-9 verification, documents, offer letters, etc.)	10 min
Unity Support	Discuss additional Unity features (Company details, Permissions, Workflows, and Reports). Prep for onboarding and offboarding customer's first employees.	10 min
ASO Support	Conduct a comprehensive review of all ASO (Administrative Services Only) services to ensure that all setup tasks are initiated and completed.	10 min



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

Company Settings

Customer preps all employee data into the right CSV file format using Rippling's documentation as guidance.

Rippling will provide detailed documentation for the Employee Census CSV templates and formats needed. Rippling will review the Census data with the customer during a call and assist in troubleshooting and resolving any issues that may arise.

2 hrs

Company Details

Customer provides departments, job titles, locations, levels, business partners, employment types, termination reasons, and EIN info (if applicable) in a CSV file.

Rippling will provide detailed documentation on what's needed for customer setup details like departments, job titles, locations, and EIN info.

3 hrs

Documents

Customer will gather and provide a few standard documents like offer letters, severance, and other standard agreement templates to Rippling.

Rippling will provide detailed documentation to guide the customer in uploading and configuring the document(s) for signature, proper routing, and approval.

3 hrs



Continued

Company Setup

Unity

YOUR RIPPLING PARTNERS

Implementation Manager

TIMING

1-2 weeks

TOTAL EXPECTED CUSTOMER TIME

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COMPLETION MILESTONES

1. Every paid employee for the current year is found in Rippling.
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CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

Employment Authorization

Customer will gather and provide I-9 documentation required to configure their Employment Authorization.

Rippling will provide detailed documentation of the Employment Authorization feature and can answer any follow-up questions the customer may have.

3 hrs

Security

Customer will gather and provide information required to configure their security settings (e.g. MFA, behavior detection, permission settings).

Rippling will provide detailed documentation sharing an overview of Rippling's security functionality & how to set it up.

2 hrs

E-Verify Integration *if purchased*

Customer will gather and provide information required to configure their E-Verify integration.

Rippling will provide detailed documentation on E-Verify and help answer any follow-up questions the customer may have.

2 hrs

Compliance 360

Customer will review their Compliance 360 Dashboard to identify any potential compliance issues (e.g. Minimum wage violations, State Sick Leave Compliance violations, etc).

Rippling will provide detailed documentation of the Compliance 360 feature and answer any questions as needed.

2 hrs

HR Help Desk *if purchased*

Customer will gather and provide information required to configure their HR Helpdesk workflow automation.

Rippling will provide detailed documentation, walk through the HR Help Desk feature, and answer any questions the customer may have.

2 hrs

HR History Import *if add-on purchased*

Customer will provide accurate data to all required fields in the Historic Data Import template (Full Name, Employment Type, Compensation, Dept, Title, etc)

Rippling will guide the customer through formatting their historical data correctly, uploading an initial test file, and finally, importing the full dataset into Rippling.

1 hr



Payroll

YOUR RIBBLING PARTNERS

Implementation Manager

TIMING

4-6 weeks

TOTAL EXPECTED CUSTOMER TIME

~11-13 hours

Customers using an unsupported payroll provider which requires manual spreadsheets for payroll imports may need an extra 1-10 hours of work.

COMPLETION MILESTONES

1. The payroll application is successfully installed.
2. Access to Year-to-Date (YTD) reporting is validated.
3. The initial import process started.
4. The final import is complete.
5. A successful first pay run has executed.



KEY MEETINGS

Payroll App Review	With the Payroll app installed, navigate through the Payroll app and review configurations related to reimbursements, deductions, and garnishments.	1 hr
Payroll Preparation Support / Payroll Processing	Monitor payroll-ready employees. Configure deductions, reimbursements, and garnishments. Import hours. Review all configured deductions, reimbursements, and garnishments. Approve payroll.	1 hr



CUSTOMER ACTIONS



RIBBLING ACTIONS

CUSTOMER HOURS

US Payroll

Customer will meet with Rippling to discuss their specific payroll configuration needs (e.g. unique tax situations, job codes, accounting integration mappings, etc).	Rippling reviews & conducts customer discovery sessions on Payroll configuration, pain points, & future needs.	1 hr
Customer provides previous Payroll provider login or YTD payroll export to Rippling.	Rippling will assist in formatting and importing payroll information, and provides detailed documentation regarding setting up required pay rates and pay types per the customer's configuration needs.	30 mins
Customer reviews YTD payroll information after Rippling imports it in to check for accuracy.	Rippling will assist in formatting and importing payroll information, and provides detailed documentation regarding setting up required pay rates and pay types per the customer's configuration needs.	2-4 hrs
Customer installs the Payroll application, sets up Payroll tax info, deposit schedules, state account numbers, and SUI rates.	Rippling will provide detailed documentation on the setup of the Payroll application and will assist in validating that the customer has provided all needed payroll setup info.	1 hr
Customer is responsible for setting up accounting integrations with guidance from Rippling.	Rippling provides resources and guidance to customers on accounting integrations.	1 hr



Continued

Payroll

YOUR RIPPLING PARTNERS

Implementation Manager

TIMING

4-6 weeks

TOTAL EXPECTED CUSTOMER TIME

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COMPLETION MILESTONES

1. The payroll application is successfully installed.
2. Access to Year-to-Date (YTD) reporting is validated.
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4. The final import is complete.
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CUSTOMER ACTIONS

US Payroll *continued*

Customer compiles templates for recurring earnings/reimbursements, deductions not managed by Rippling, state tax information, and confirms access to log into accounting system.

Customer reviews all deductions, reimbursements, and garnishments set up in the Payroll app. Customer will also ensure employees are set up in the correct employment type and add any additional custom pay types, as needed.

Customer will approve and process their first payroll in Rippling.



RIPPLING ACTIONS

Rippling will import recurring earnings/reimbursements, and deductions for the customer. Rippling will also provide detailed documentation to ensure the customer is ready or their first payrun.

Rippling conducts Payroll training which includes monitoring payroll-ready employees, setting up one-time changes for upcoming pay dates, reviewing bonuses, reviewing commissions, reimbursements, and importing hours.

Rippling will walk customer through all the steps needed to process their first payroll in Rippling.

CUSTOMER HOURS

1 hr

1 hr

1 hr



Benefits

Open enrollment or transfer

YOUR RИPLING PARTNERS

Implementation Manager

TIMING

3-5 weeks

TOTAL EXPECTED CUSTOMER TIME

~8-10 hours

COMPLETION MILESTONES

1. 100% of Benefits-eligible employees have existing plan selections in Rippling.
2. Deductions are synced and Payroll and Ben-admin insurance deductions match.
3. Employees have been invited to make elections in any ancillary Benefit apps like FSA, HSA, Commuter, COBRA (as applicable).
4. The 401K deduction process for the first pay run has been explained and initiated (if applicable).



KEY MEETINGS

Insurance App Review Call(s)	Review the configuration of Company Benefits and finalize the installation of the Insurance app.	20 mins
FSA/Flex Review	Ensure the installation of all related apps (FSA, HSA, Commuter). Identify the bank account that will be funding HSA.	20 mins
COBRA/ACA Review	Review the COBRA app and discuss ACA timing and next steps.	10 mins
401K Alignment	Review and align the 401K integration with the specified provider for a successful first pay run.	10 mins



CUSTOMER ACTIONS



RИPLING ACTIONS

CUSTOMER HOURS

Benefits Administration

Customer provides new (OE) or existing benefits plans (Transfer), carrier information, and a Benefits Census of employee elections.

Rippling will provide detailed documentation on the configuration of the Ben admin app and importing of elections. The IM manager will flag any deduction discrepancies to the customer for review.

2-4 hrs

Customer finalizes the installation of the Insurance app and reviews the accuracy of all information entered into Rippling. Customer confirms that Benefits are ready for "Go Live".

Rippling reviews the configuration of company benefits, and insurance enrollments and assists in finalizing the installation of the Insurance app. If going through Open Enrollment, Rippling will go through the Enrollment Preview with the Customer to walk through open enrollment from the employees' perspective.

2-4 hrs

CarrierConnectEDI if purchased

Customer will discover Carriers that support Carrier Connections, evaluate the expected timelines for each setup, define Carrier class code account structures, add the Carrier Connect subscription to their Rippling account, sign off on required Carrier authorizations and track the status of the Carrier connection set up.

Rippling will provide detailed documentation on setting up carrier connections to eligible carriers. This includes feed structure, class codes & enrollment reports from EDI carrier.

1-2 hrs



Continued

Benefits

Open enrollment or transfer

YOUR RИPLING PARTNERS

Implementation Manager

TIMING

3-5 weeks

TOTAL EXPECTED CUSTOMER TIME

~8-10 hours

COMPLETION MILESTONES

1. 100% of Benefits-eligible employees have existing plan selections in Rippling.
2. Deductions are synced and Payroll and Ben-admin insurance deductions match.
3. Employees have been invited to make elections in any ancillary Benefit apps like FSA, HSA, Commuter, COBRA (as applicable).
4. The 401K deduction process for the first pay run has been explained and initiated (if applicable).



CUSTOMER ACTIONS



RИPLING ACTIONS

CUSTOMER HOURS

Guideline 401k if purchased

Customer reaches out to previous 401K Provider to inform them that they're changing 401K vendors to Rippling.
Customer installs the Rippling 401K app.

Rippling ensures that the integration is working correctly and will work with Guideline to resolve any issues that may arise.

30 mins-
4 hrs per
App

Human Interest 401K if purchased

Customer reaches out to previous 401K Provider to inform them that they're changing 401K vendors to Rippling.
Customer installs the Rippling 401K app.

Rippling ensures that the Human Interest integration is working correctly and will work with Human Interest to resolve any issues that may arise.

30 mins-
4 hrs per
App

Flex Benefits (FSA / HSA / Commuter) if purchased

Customer provides plan details and performs balance transfers for FSA, HSA and Commuter to Rippling Benefits Consultant.

Rippling will provide detailed documentation on how to best configure the FSA, HSA, and Commuter apps.
Rippling will guide the customer in formatting spreadsheets and importing elections and balances, where applicable.

30 mins-
4 hrs per
App

OneMedical if purchased

Customer will install the OneMedical integration.

Rippling will provide detailed documentation as needed. The customer will escalate any questions to OneMedical directly.

30 mins-
4 hrs per
App

Tilt Integration if purchased

Customer will install the Tilt integration, authorize Tilt to access Rippling data and log in to Tilt to complete the API integration.

Rippling will provide detailed documentation as needed. The customer will escalate any questions to Tilt directly.

30 mins-
4 hrs per
App

COBRA if purchased

Customer will install the COBRA application and map COBRA eligible participants and their dependents to their plan elections.

Rippling provides detailed documentation for the COBRA app configuration and answers any customer questions on setup.

30 mins-
4 hrs per
App

ACA if purchased

Customer compiles ACA data in a pre-determined format and uploads it into Rippling.

Rippling provides detailed documentation on installing the ACA app, tracking ACA, and filing ACA. Rippling will also answer any questions the customer may have to ensure a smooth ACA setup.

30 mins-
4 hrs per
App



IT

YOUR RИPPLING PARTNERS

Implementation Manager

TIMING

1-3 weeks

TOTAL EXPECTED CUSTOMER TIME

~4-6 hours

COMPLETION MILESTONES

- App Mgmt:** At least 5 apps installed.
- Device Mgmt:** At least 50% of EEs have device assigned to them with agent installed.
- Inventory Mgmt:** 1+ Device added to Inventory.
- Okta / Azure:** Access rules are setup.
- API Access:** At least one API call has been made.



KEY MEETINGS

App Integration Review	Provide an overview of the Rippling App Shop, identify and begin installing 3rd party apps from the App Shop, and answer questions related to the setup and configuration of apps.	20 mins
Device Management Review	Ensure the proper installation of the Devices app and provide an overview of how to roll out Device Management to employees.	20 mins
Device Management Launch Support	Provide additional support and guidance on the roll out of Device Management to employees, and review the status of the installation of the Rippling Agent on employees' devices.	20 mins



CUSTOMER ACTIONS



RИPPLING ACTIONS

CUSTOMER HOURS

App Management *if purchased*

Customers will install third-party apps they wish to integrate with Rippling.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Devices *if purchased*

Customers will install the Device Management application, configure Device Management policies, and invite employees to install the Rippling MDM agent on the applicable company's computers.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Inventory Management *if purchased*

The customer installs the Inventory Management app and configures Inventory Management policies.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

1Password *if purchased*

Customer installs the 1Password application and provisions access.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs



Continued

IT

YOUR RИPLING PARTNERS

Implementation Manager

TIMING

1-3 weeks

TOTAL EXPECTED CUSTOMER TIME

~4-6 hours

COMPLETION MILESTONES

1. **App Mgmt:** At least 5 apps installed.
2. **Device Mgmt:** At least 50% of EEs have device assigned to them with agent installed.
3. **Inventory Mgmt:** 1+ Device added to Inventory.
4. **Okta / Azure:** Access rules are setup.
5. **API Access:** At least one API call has been made.



CUSTOMER ACTIONS



RИPLING ACTIONS

CUSTOMER HOURS

API Access if purchased

Customer reads through API documentation and configures Rippling to their needs.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Azure if purchased

Customer installs & configures the Azure integration in order to create/suspend accounts, manage groups/subscriptions, and enable employee sign in to access external resources.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Brex if purchased

Customer installs the Brex app and ensures proper provisioning access.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Dropbox if purchased

Customer installs the Dropbox app and ensures proper provisioning access.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

Okta if purchased

Customer installs the Okta app integration and configures the app in order to SSO into OKTA, create/suspend accounts, and manage groups.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs

SentinelOne if purchased

Customer installs the SentinelOne app and ensures proper provisioning access.

Rippling will provide RipplingU and Help Center resources and will answer questions about configuration on dedicated IT call.

30 mins-4 hrs



Time & Attendance

YOUR RIPPLING PARTNERS

Implementation Manager

TIMING

1-3 weeks

TOTAL EXPECTED CUSTOMER TIME

~4-6 hours

COMPLETION MILESTONES

1. The Time and Attendance (T&A) application has been fully installed. At least one non-admin employee has been granted Time & Attendance (T&A) access.
2. The Time Off application has been successfully installed. All current policies have been activated and balances for applicable employees have been loaded.



KEY MEETINGS

T&A Review	Provide an overview of the T&A and Time off apps. Review and approve configured policies.	30 mins
Time Off Review	Discuss and configure shift differentials, additional custom pay policies, and job codes.	30 mins



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

T&A

The customer gathers requirements for T&A policies for Rippling to review.

Rippling learns about the customer's overall time & attendance current process, policies, and how they'd like Rippling to be set up. Rippling gathers Time Off policy requirements.

1 hr

The customer will install the T&A application and review and approve T&A policies they've previously configured.

Rippling will provide detailed documentation on the configuration of custom T&A policies in Rippling.

1 hr

The Customer will gather and provide the information required to configure custom pay policies and job codes.

Rippling instructs the customer on inviting employees to use the T&A app and walks the customer through the Time Card approval process for Payroll.

2 hrs

Rippling will provide detailed documentation on the configuration of shift differentials, custom shifts, and advanced overtime policies, ensuring the customer is set up for future success.

Time Off

The customer gathers and configures their time off policies based on business needs.

Rippling will provide detailed documentation on Time Off policies and answer any questions the customer may have.

1 hr



ASO

YOUR RИPPLING PARTNERS

Implementation Manager

TIMING

1-3 weeks

TOTAL EXPECTED CUSTOMER TIME

~4-6 hours

COMPLETION MILESTONES

1. Ensure customer has completed ASO Setup Tasks for Rippling.
2. Ensure access to the Mineral platform.
3. Ensure customer can access and use Rightway (customer must also be using Rippling for Benefits Administration).
4. Ensure customer has installed LMS app and activated sexual harrassment courses (or signed opt-out for LMS).

Continued



KEY MEETINGS

Unity Call - ASO overview	Review all of the services included in ASO subscription and provide a high level overview of how to utilize these new services (e.g. Mineral, access to HR Advisors).	1 hr
Insurance Review	Discuss how employees can access Rightway and the services that are provided as well as any custom Guardian plans (and potential associated benefits e.g. Spring Health, XP Health and EAP where applicable).	1 hr
Payroll Review	Review state unemployment, state withholding, and local payroll tax account creation.	1 hr
ASO Implementation Wrap Up	Perform a review of all ASO services and ensure all set up tasks are completed.	1 hr



CUSTOMER ACTIONS



RИPPLING ACTIONS

CUSTOMER HOURS

ASO - Installation & Tax Setup

The customer completes the ASO setup and installs LMS per the in-product setup guide.

The ASO setup card includes customers providing information for Rippling to handle state unemployment, state withholding, and local tax account creation. This information requested varies across states and includes but is not limited to questions around operations in that state.

Rippling will collect any additional information required by the states to complete the state unemployment, state withholding, and local tax account creation. Rippling will help create the tax accounts.

1 hr

ASO - Compliance

The customer creates admin accounts in the Mineral app. Customer also has the option to cancel their current EPLI coverage.

Rippling guides the Customer to install and access various ASO services including HR Advisors, Mineral app, Workplace Posters, EPLI coverage, and Rightway.

30 mins



Continued

ASO

YOUR RIPPLING PARTNERS

Implementation Manager

TIMING

1-3 weeks

TOTAL EXPECTED CUSTOMER TIME

~4-6 hours

COMPLETION MILESTONES

1. Ensure customer can access HR Advisors.
2. Ensure setup for Custom Guardian Plans is complete (plans configured, EDI in place, and shared info on XP health, Spring Health, and EAP where applicable).
3. Ensure customer understands they are enrolled in Rippling EPLI policy.



CUSTOMER ACTIONS

ASO - Workers' Comp

Customer installs the Next Worker's Comp app (optional) to sync in class code information and send payroll data to Next Insurance for billing to create an efficient administration process. Alternatively, the customer can choose to manage workers' comp outside of Rippling and manually send reports to their workers' comp vendor.

ASO - Benefits (if offering Rippling/NFP brokered custom ASO Guardian plans)

Customer configures open enrollment for the Rippling brokered ASO Custom Guardian plans.



RIPPLING ACTIONS

Rippling provides guidance on the installation of the Next Worker's Comp app (optional) or how to send data manually to their workers' compensation vendor

Rippling broker partner sets up custom Guardian plans, if applicable.

CUSTOMER HOURS

30 mins

30 mins



Spend Management

YOUR RИPPLING PARTNERS

Onboarding Manager, Finance Cloud*

TIMING

3-5 weeks (often faster)

TOTAL EXPECTED CUSTOMER TIME*

~7.5 hours

COMPLETION MILESTONES

1. All users have been invited to Spend Management and all spend has been ported over to Rippling.
2. Integration/import to ERP is functioning and all policies have been successfully setup.

*If Monthly Spend is >\$25K you'll receive Consultative Implementation as outlined above. Otherwise, your team will go through self-guided onboarding via Rippling resources that the Rippling team will share.



KEY MEETINGS*

Kickoff Call	Identify pain points, desired outcomes, review account details, and establish end-user rollout date + "full migration" date.	1 hr
Onboarding Call(s)	Hands-on consultation regarding cards, policies, users, and coding/reconciliation.	1.5 hrs
Launch Call	Review Finance Cloud buildout to ensure customer satisfaction + determine details of end-user rollout (launch).	1 hr
Success Review Call	~2 weeks after launch, sync to ensure pain points are being solved for + desired outcomes are being realized. Tweak as needed. Confirm all spend has been ported over.	1 hr
Accounting Integration Call	If needed, work through the accounting integration and mappings together (Customer should be able to do this on their own).	30 mins
End User Training Call	Screen-shared demo for end-users on cards, coding transactions, and expense reimbursements.	30 mins



CUSTOMER ACTIONS



RИPPLING ACTIONS*

CUSTOMER HOURS

Corporate Cards & Expense Management

First spend. Link integration.	Demonstrate how to make first transaction/access cards + show where to link ERP integration. Send follow-up with resources.	1-1.5 hrs
Build policies, configure integration, and build Cards.	Consult with customer to brainstorm Spend policies by Spend Type, Employee Group, etc. Help customer build out those policies in Rippling and configure their integration and Corporate Card and approval rules.	2 hrs-2.5 hrs
Invite users + send end user material.	Provide resources for end users and answer any customer questions, as needed.	1-1.5 hrs
Confirm all spend is ported over.		1 hr
Work through integration issues (if any) with Onboarding Manager.	Check in with customer and answer any questions or troubleshoot any integration hiccups (as needed).	30 mins
Host training zoom call with the employees.	Provide resources and be available to help with end user employee training, as needed.	30 mins



Unity Automation - Self-Guided

default service

TIMING

~1-2 weeks

TOTAL EXPECTED CUSTOMER TIME

~1-3 hours

This assumes you will review RipplingU Content and set up a simple workflow, report, permission profile, and approval process. If you want to setup more workflows, approvals, reports, and formuals, the expected Customer Time is 10+ hours.

COMPLETION MILESTONES

1. Review the RipplingU content and setup a report.
2. Set up at least 1 permission profile, 1 custom workflow, and 1 approval process.

CUSTOMER ACTIONS

Unity + Self Guided

Customer will configure Unity Automation features within the Rippling platform. This includes setting up workflows, approvals, reports, formulas, and permissions. By handling the configuration of Unity Automation, the customer can customize and tailor the automation features to align with their specific business processes and requirements. This allows for efficient and streamlined operations within the Rippling platform.

RIPPLING ACTIONS

Rippling will provide RipplingU and Help Center resources for a self guided approach to Unity Automation.

CUSTOMER HOURS

1-3 hrs



Unity Automation - Consultative

additional \$5,000

YOUR RIPPLING PARTNERS

Automation Consultant

TIMING

2-4 weeks

TOTAL EXPECTED CUSTOMER TIME

~5-7 hours

COMPLETION MILESTONES

1. There are at least 5 Custom Workflows and 3 Approvals setup.
2. There is at least 1 Permission Profile and 1 Custom Report setup.



KEY MEETINGS

Intro Kickoff Call	Rippling intros and shares how the Automation engagement will work.	30 mins
Discovery Meeting 1: Workflows and Approvals	Understand customer's current business processes around workflows, approvals, reports & permissions. Prioritize top deliverables to build in Rippling.	2-4 hrs
Discover Meeting 2: Reports and Permissions		
Review & Training: Workflows & Approvals	Rippling reviews the workflows and approvals configuration & teaches the customer how the deliverables were built.	1 hr
Review & Training: Formulas, Reports, Permissions	Rippling reviews the custom reports and permission profiles configuration & teaches how the deliverables were built.	1 hr
Wrap up Call (optional)	Customer can use this time to ask any last minute questions related to the deliverables.	30 mins



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

Unity - Overview

Customer brainstorms deliverables they'd like to have Rippling configure (workflows, approvals, reports, & permissions).

Rippling sends over RipplingU and other materials for customer to review.

Customer reviews Rippling materials and self-educates on Automation features to better articulate what Rippling should custom build for the customer.

3-5 hrs

Unity - Workflows + Approvals

Customer brings brainstormed deliverables to the discovery meeting in order for Rippling to deliver a proposed solution tailored to customer's specific needs.

Rippling learns about the customer's business processes and how the customer would like to automate their specific workflow and approval processes within Rippling. Rippling will build out up to 5 custom workflows & 3 approval processes.

2 hrs



Continued

Unity Automation - Consultative

additional \$5,000

YOUR RIPPLING PARTNERS

Automation Consultant

TIMING

2-4 weeks

TOTAL EXPECTED CUSTOMER TIME

~5-7 hours

COMPLETION MILESTONES

1. There are at least 5 Custom Workflows and 3 Approvals setup.
2. There is at least 1 Permission Profile and 1 Custom Report setup.



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

Unity - Formulas, Reports, Permissions

Customer brings brainstormed deliverables to the discovery meeting in order for Rippling to deliver a proposed solution tailored to the customer's wants and needs.

Rippling learns about the customer's current reporting, formula needs, and permissions/access policies. Rippling will work with the customer to build 1 custom report and 1 permission profile to work to the customer's exact specifications. We'll also teach the customer how to build more on their own.

2 hrs

Unity - Workflows + Approvals | Reports + Permissions

Review Rippling deliverables, sign off on deliverables, and learn detailed information about the products to drive further adoption and to make any future customizations.

Rippling reviews the deliverables with the customer and shares why and how the deliverables were configured so the customer can build future deliverables self sufficiently.

2 hrs

Unity Wrap Up

Ask any remaining questions about the Unity Pro or Unity Unlimited features focused on workflows, approvals, reports, formulas, and permissions so customer is set up for future success.

Rippling conducts a final call to wrap up any last edits or questions so the customer is confident with the setup and how to use these features on their own in the future.

30 mins



Recruiting & Comp Bands

YOUR RIPPLING PARTNERS

Talent Consultant

TIMING

~4-6 weeks

TOTAL EXPECTED CUSTOMER TIME

~25-30 hours

COMPLETION MILESTONES

At least one job requisition is ready for launch.



KEY MEETINGS

Talent Intro Call	Introduce the scope of Talent products and outline the timeline for the customer. Rippling will share next steps so the customer can prepare for the rest of the Talent implementation.	30 mins
Configuration Review	Rippling will review the customer's configuration after the customer has completed the Rippling U course and configured their settings in the Recruiting product. Customer should come to this meeting with their Active Job req import ready to deliver to Rippling for import.	30 mins
Cutover Prep Call	Rippling has completed the Active Job Req import. Customer is aware and understands the next steps of customerizing the job reqs. Rippling will schedule the cutover call and make sure the customer is aware of key deadlines.	30 mins
Cutover Call	Customer turns the Job Board live and starts on active candidate data import. The Job Board must go live first so that Rippling can be the single source of recruiting data going forward.	30 mins



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

CUSTOMER ACTIONS	RIPPLING ACTIONS	CUSTOMER HOURS
Compensation Bands*		
Customer reviews Compensation Bands Rippling U course and implements the product.	Rippling will review the Comp Bands configuration with customer after customer has setup Comp Bands. (30 mins)	5 hrs

**If Recruiting is purchased, Rippling will help review the customer's Compensation Bands to ensure everything is setup correctly before the Talent Consultant guides the customer on Recruiting setup.*



Continued

Recruiting & Comp Bands

YOUR RIPPLING PARTNERS

Talent Consultant

TIMING

~4-6 weeks

TOTAL EXPECTED CUSTOMER TIME

~25-30 hours

COMPLETION MILESTONES

At least one job requisition is ready for launch.



CUSTOMER ACTIONS

Recruiting if purchased

- Compile settings, permissions, and referral program requirements for your Job Board.
- Download and compile any templates, offer letters, and pipeline process documentation.
- Decide on the active requisitions and candidates that will be migrated to Rippling and which, if any, will stay in the legacy system.

Customer exports all relevant active requisitions and delivers to Rippling for import.

Customer exports all active candidate data and imports the data into Rippling. Customer will "turn on" Job Board after active Job requisitions are imported by Rippling and customized by customer.



RIPPLING ACTIONS

Rippling will provide RipplingU and Help Center resources for customer to build out Recruiting app. Talent Consultant available to answer questions as needed.

Rippling will import all active job req data.

CUSTOMER HOURS

15-20 hrs

5 hrs

5 hrs



Headcount Planning

TIMING

1-2 weeks

TOTAL EXPECTED CUSTOMER TIME

~10-15 hours

COMPLETION MILESTONES

Active Headcount Plan in Rippling.

 CUSTOMER ACTIONS	 RИPLING ACTIONS	CUSTOMER HOURS
Compensation Bands		
Customer handles the configuration of levels and job families structures.	Rippling will provide RipplingU and Help Center resources for a self guided approach to Headcount Plan.	1-8 hrs
Headcount Planning <i>if purchased</i>		
Customer compiles approved headcount by title, location, job family, department, and employment type.	Rippling will provide RipplingU and Help Center resources for a self guided approach to Headcount Plan.	1-3 hrs
Customer handles the configuration of headcount planning and permissions.	Rippling will provide RipplingU and Help Center resources for a self guided approach to Headcount Plan.	1-3 hrs



Performance Management

TIMING

1-2 weeks

TOTAL EXPECTED CUSTOMER TIME

~10 hours

COMPLETION MILESTONES

One Performance Management review cycle is ready for launch.



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS

Performance Management *if purchased*

Customer compiles prior review cycle template(s).

Rippling will provide RipplingU and Help Center resources for a self guided approach to Performance Management.

2 hrs

Customer handles the configuration of the Performance Management application.

Rippling will provide RipplingU and Help Center resources for a self guided approach to Performance Management.

4-8 hrs



Learning Management & Pulse

TIMING

~1 week

TOTAL EXPECTED CUSTOMER TIME

~2-5 hours

COMPLETION MILESTONES

1. **Pulse:** At least one survey is created and ready for launch.
2. **Learning Management:** You assigned the first mandatory courses to your employees.

CUSTOMER ACTIONS

LMS & Pulse *if purchased*

Through the Rippling in-product setup flow, you'll be guided to set up Rippling Learning Management. Rippling U course content will be readily available for you to watch at your own pace. You'll upload course content and set up your Learning Management policies in a few easy steps.

RIPPLING ACTIONS

Rippling will provide RipplingU and Help Center resources for a self guided approach to Learning Management.

CUSTOMER HOURS

2-5 hrs



Global Payroll & Benefits

YOUR RIPPLING PARTNERS

Global Implementation Manager

TIMING

6-12 weeks, dependent on country, can be concurrent

TOTAL EXPECTED CUSTOMER TIME

~10-30 hours per country, highly dependent on country complexity & reporting

COMPLETION MILESTONES

1. At least one Global payroll run is in "Paid" status and Customer has been released from Global Implementation.
2. Global Benefits configuration (rates, enrollment, contribution schemes, etc.) confirmed by customer team (if purchased).



KEY MEETINGS

Payroll Install Walkthrough	Walk through installing Payroll and migrating employees to Global Payroll with the customer's administrative team.	30 mins
Insurance Review Call	Walk through the insurance installation that was completed (optional).	30 mins
Global Payroll Processing Support	Review Payroll, make any last minute changes, as needed, and hit the "Approve" button!	30 mins



CUSTOMER ACTIONS *Note: May be for multiple countries*



RIPPLING ACTIONS

CUSTOMER HOURS

Global Payroll

Customer sets up global entities, work locations, and adds global employees to Rippling.	Provides initial action items with links to resources; available via email to assist with entity + other initial setup questions.	1 hr
Call with Rippling Global IM to set up Global Payroll app.	Rippling Global IM leads call on setting up the app.	30 mins
Customer sets up payroll tax info and connects tax accounts to Rippling using the Third Party Administrator setup process.	Rippling Global IM provides resources on how to set up TPA with tax accounts and answers questions, as needed.	1-2 hrs
Set up recurring earnings & deductions, including pensions for appropriate countries. Prepare for payroll processing by working with employees to ensure their personal information is entered in on time.	Rippling Global IM can assist with questions and provide resources to assist setup process.	1 hr
Customer provides YTD data in format requested by the global IM manager. Each country's requirements varies. In some countries, this will include filling out a YTD spreadsheet (which can be on the higher time commitment) and some countries only require to provide filings from your previous provider for Rippling to import.	Rippling formats, audits, and imports payroll information.	1-10 hrs



Continued

Global Payroll & Benefits

YOUR RIPPLING PARTNERS

Global Implementation Manager

TIMING

6-12 weeks, dependent on country, can be concurrent

TOTAL EXPECTED CUSTOMER TIME

~10-30 hours per country, highly dependent on country complexity & reporting

COMPLETION MILESTONES

1. At least one Global payroll run is in "Paid" status and Customer has been released from Global Implementation.
2. Global Benefits configuration (rates, enrollment, contribution schemes, etc.) confirmed by customer team (if purchased).



CUSTOMER ACTIONS Note: May be for multiple countries



RIPPLING ACTIONS

CUSTOMER HOURS

Global HR

Concurrently while the Import is being completed, customer will audit employee salaries, invite employees to Rippling, and complete other general set up tasks unique to their HR, Payroll, and business processes.

Rippling will guide and advise the customer, as needed, for the initial Rippling setup to ensure employees can easily access and navigate Rippling.

2-4 hrs

Global Payroll & Accounting

Customer responsible for setting up accounting integrations with guidance from Rippling.

Rippling Global Implementation Manager provides resources and guidance to customers on how to properly set up accounting integrations.

1 hr

Customer enters final inputs and processes payroll.

Rippling guides customer through a payroll training and live payroll call for the first Rippling pay run.

1-2 hrs

Global Benefits

Customer provides benefits plans, carrier information, and a benefits census of employee elections.

Rippling configures the Ben admin app, imports elections, and flags any deduction discrepancies to customer for review and reconciliation. Rippling provides overview call, if desired, after the insurance information is installed.

1 hr



Global EOR

YOUR RIPPLING PARTNERS

EOR Implementation Manager

Global EOR Consultant

TIMING

4-6 weeks per country

TOTAL EXPECTED CUSTOMER TIME

~2-6 hours per country

COMPLETION MILESTONES

1. At least one Global payroll run is in "Paid" status.
2. Global Benefits and Global Retirement options are set up or confirmed that the customer is not offering those at this time.



KEY MEETINGS

Kickoff Meeting	Overview of what the EOR Implementation will entail, walk through hiring flow per country and review options for the EAs (employment agreements) like offering equity and covering the Work Authorization process.	1 hr
Global Benefits Meeting	Consult on pricing, benefit funding requirements/contribution scheme options per country, set up benefits, launch Open Enrollment (OE), confirm Employee (EE) deadline, and chat through renewal periods.	45 mins
Global HR/Time Off Meeting	Overview of Compliance 360 for Global EEs and LMS requirements. Review default time-off policies, confirm statutory minimums per country, create custom time off-policies that at least cover the statutory minimum.	45 mins
Global Payroll and Accounting Meeting	Overview of the Global Payroll App and Accounting Integrations App. Review pay schedule options, add custom pay types, recurring deductions, and any other payroll needs. Confirm on-cycle auto-approval process and confirm deadlines.	1 hr



CUSTOMER ACTIONS



RIPPLING ACTIONS

CUSTOMER HOURS*

EOR [Country] Benefits

Onboard EOR Employees (EEs), set up global benefits, confirm options that can be included in the EA (Employment Agreement) like probationary periods, vacation days, equity, non-competes, etc. Reviews benefit options that are not included in product yet like GRSP for Canada, Plum benefits for India, Salary Sacrifice for UK, etc.

Rippling consults customer on the best way to set up Global Benefits, Employment Agreements, Vacation Days, Trainings (LMS). Help Customer tailor their Rippling experience for their organization and employees to set them up for ongoing success.

30 mins-
1.5 hrs

EOR [Country] Management

Ensure EOR EE(s) complete their onboarding, complete work authorizations, and send EE questions to Rippling team. Follow up with EEs who have not completed this by their intended EOR start date. Start dates are pushed if the EA is not signed and work auth. is not completed at least 2 business day prior to EOR start.

Rippling answers questions for customer to ensure timely EOR start and to ensure EEs are in compliance.

30 mins-
1.5 hrs



Continued

Global EOR

YOUR RIPPLING PARTNERS

EOR Implementation Manager

Global EOR Consultant

TIMING

4-6 weeks per country

TOTAL EXPECTED CUSTOMER TIME

~2-6 hours per country

COMPLETION MILESTONES

1. At least one Global payroll run is in "Paid" status.
2. Global Benefits and Global Retirement options are set up or confirmed that the customer is not offering those at this time.



CUSTOMER ACTIONS

EOR [Country] Payroll and Accounting

Review default time off policies and customize policies based on statutory requirements and what the admin included in the EA per EE. Review and update Global Pension app (if applicable). Also review Global Payroll app, add custom pay types, process first global payroll with Rippling Global IM. Customer responsible for setting up accounting integrations with guidance from Rippling.

EOR [Country] Management

Work through follow up questions from employees.



RIPPLING ACTIONS

Rippling consults customer on time off policy setup, Pension app setup (if applicable), Payroll app setup, custom pay types, and ensures the Customer is confident in processing first Global Payroll run. Rippling Global Implementation Manager provides resources and guidance to Customers on how to properly set up accounting integrations.

Email check-in to ensure everything is running smoothly and that the customer's Admin team has everything they need.

CUSTOMER HOURS*

30 mins-
1.5 hrs

30 mins-
1.5 hrs

*Varies by the number of countries and Employees (EEs).

Ongoing education ensures you get the most from Rippling.

