

Q1 Wins And Great Things: What happened in the organization during the last period/quarter, or coming up next period/quarter, that deserves attention or celebration? Especially share any news from your team or department that is relevant to the entire organization, but they may not know about.

Answered: 34 Skipped: 2

#	Responses	Date
1	Communication on themes and priorities has definitely improved! Mosaic Client Experience priority was completed! This was a huge task and everyone who worked on its completion did a fantastic job!	8/9/2016 11:06 AM
2	Productivity/utilization picked back up	8/9/2016 10:57 AM
3	We hired Denise Maddox and she is already contributing to the success of the team. Sales closed a large portion of their pipeline. We signed the Clarizen contract and will begin that implementation. Great onsite visit with Gate Gourmet opened our eyes to the impact we can potentially have on our clients. We need to do more of those!	8/8/2016 3:44 PM
4	We now have more structure in the team with the addition of Denise M and Ryan on the consulting services side. Letting go of bad apples was a win. Promises to move to more unified systems will be a win. The vetting process has been completed so soon we will have the systems in place.	8/8/2016 3:00 PM
5	Wins: MCG is growing! HR is doing a fantastic job recruiting. Great things: MPS is ramping up for several new clients and moving into their own building (next door, into the meeting/training building). CEC guidelines were constructed... a great tool to make sure everybody is on the same page with the processes.	8/8/2016 12:33 PM
6	Great additions to the team who have begun contributing: Denise M, Sarah, Paula, Towanna, Tricia, Meadow, Nita. Great job Denise E and Meadow on recruiting. Sales pipeline and orders are increasing. Great job Dave and Shannon!! Thank you notes were a big success. Andy: Owning it on computer issues as well as getting new-hires set up. Ceci: Bringing a professional image to Mosaic.	8/8/2016 12:30 PM
7	New Hires - great additions to the team Functional/Technical/Premier Support - great collaboration and partnership Operations - being the duck MPS - kudos to new accounts	8/8/2016 11:50 AM
8	Project Management system is now selected	8/8/2016 11:31 AM
9	We should all celebrate that we have met our Company Goals for the quarter!! What an awesome team!!	8/8/2016 11:23 AM
10	The hiring of a new Director of Consulting Services had brought a new clarity to the team and a welcomed change.	8/8/2016 11:22 AM
11	After several months of testing we successfully moved Rockwater's payroll from the back office to the web with no issues. The payroll team brought on a new Payroll Account Specialist, Tricia, who has been a great addition to the team. She is not afraid to jump right in and help out wherever possible. The payroll team also brought on 2 new clients and another is coming on at the end of August.	8/8/2016 11:17 AM
12	N/A	8/8/2016 10:55 AM
13	Sales pipeline growth, planned move of team to project mgmt tool better suited to our needs	8/8/2016 10:54 AM
14	I think one of the greatest things to happen is Denise Maddox's hire. (No pressure, Denise!) Having a person with her level of expertise to help us better coordinate and implement projects is exactly what we needed.	8/8/2016 10:50 AM
15	You hired me. :) Since I've only been here a couple of weeks some of these are really hard to answer. I think the morning huddles are great though, I feel like I know more about Mosaic's priorities and my team's contribution to those in two weeks than I ever did at my previous company.	8/8/2016 10:28 AM
16	Great new hires!	8/8/2016 9:46 AM
17	The sales pipeline has been very active this quarter - we have had a lot of new and return clients seek us out, which is a testament to our reputation. The team works very hard for our customers, and it shows.	8/8/2016 9:34 AM

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18	New Hires - Sarah, Towanna, Paula and Nita are great additions to the team. Sales - Great opportunities and new partnerships. Functional/Technical/Premier Support - Great collaboration and team work. MPS - Kudos to new accounts	8/5/2016 8:30 AM
19	I've just recently started with Mosaic,since I have started there have been several new MPS clients added, the company is growing steadily and that is great for everyone at Mosaic.	8/3/2016 10:34 AM
20	I feel like Mosaic is putting together a good structure that will benefit the organization in the future.	8/2/2016 10:41 AM
21	We hired and onboarded 6 new people and had the majority billable within a few weeks from their first day.	8/1/2016 5:20 PM
22	Growth! It's so exciting to get such a rush of new employees come in right before the quarterly planning session! I think the new hires are all great selections and I'm very excited to work with everyone. Also the CEC has been a great project this quarter and I really feel it is going to provide a lot of clarity as we continue to grow.	8/1/2016 4:55 PM
23	Mosaic is starting to become more organized, which is a good thing	8/1/2016 4:49 PM
24	Starting using Zoom. This has been great. I enjoy having meetings and being able to see my coworkers. It makes it feel more like we are a team instead of a person on the other end of the phone.	8/1/2016 2:20 PM
25	n/a	8/1/2016 2:04 PM
26	Lots of new hires. Where did all these people come from?	8/1/2016 1:50 PM
27	Mosaic has been able to add some great team members. Mosaic is becoming more visible to more people at Ultimate and more customers.	8/1/2016 11:21 AM
28	I think a huge "win" was Denise Maddox being hired. I think she will be a great asset to the team.	8/1/2016 10:44 AM
29	New team members!	7/29/2016 3:49 PM
30	As a team we selected an operations tool for Mosaic.	7/29/2016 11:14 AM
31	The recruiting and on-boarding of so many new employees was very exciting for HR!	7/29/2016 11:03 AM
32	We are continuing to assemble a pretty awesome team that I'm proud to be a part of every day. All of our team members seem to be doing their best or better every day and that's awesome!	7/29/2016 9:34 AM
33	Vicki's Mid Market presentation slide deck was a great showcase of who Mosaic is. Lots of positive feedback on an array of team members from clients Ryan in the System Architect role has been extremely beneficial	7/29/2016 9:12 AM
34	The CEC Guidelines. I personally feel this goal is going to be a huge win to prevent defects in our service and a solid foundation for a new hire's start up with our company.	7/29/2016 7:47 AM

Q2 Feel Of The Team: Looking back over the past period/quarter, how is the 'feel' of your team and/or the organization? Please include any positive or negative feedback that is relevant to the entire organization.

Answered: 36 Skipped: 0

#	Responses	Date
1	The feel is starting to get better from my perspective. I think Mosaic experienced a lot of change but it was needed. Change is not always the easiest in the beginning but it pays off in the end. I am very happy to work with each person at Mosaic! Each person at Mosaic has their own personality and now with many more employees, it is just learning and adapting to each person's personality. Sometimes I feel we put too much emphasis on the "small" company feel. We are a growing company and have to adapt to the changes.	8/9/2016 11:06 AM
2	Again, a lot of new faces to get to know.	8/9/2016 10:57 AM
3	I think the team is experiencing some 'change fatigue' and there is still some angst over utilization. We need to figure out how to effectively resource our projects to improve our utilization. Please seem to be very busy and sometimes stressed but our numbers are low. Despite that, there is still energy and excitement over our growth and where we are as an organization. We just need to get through the next year or so while we lay the foundation that will allow us to scale painlessly.	8/8/2016 3:44 PM
4	This has been a rough quarter. Those with hours are fine or they are feeling over loaded; those without hours are feeling frustrated and wishing to gain more hours. Work is going to the same people having specific skill sets and some team members are not ready in their progression with the tools to learn skill sets that would allow work to be distributed more evenly. They are gaining experience but that does take time, that is not a bad thing. So many new people with such low company utilization in place with the current team seems like a bad move. There is not enough work to have the company at 80% utilization. The report is now becoming demotivating as the percentage is slipping down further and we are in 3rd quarter. Management is asked about the work available and we are told it is in the works but the report shows that there is a gap in what we are being told and what is occurring. How will the company recognize outstanding performers if club is not awarded? That is even more demotivating.	8/8/2016 3:00 PM
5	The organization is growing so quickly that it's starting to feel less like the small and tight-knit company we have worked for the last 5 years. To help with this, I feel that HR's emails with new-hire introductions should be individual, and with a picture or LinkedIn link, so we can put faces to the names and provide a more personalized welcoming experience for the new hires. Also, providing a PDF or some king of document to new hires with everyone else's names, photos and locations might be nice for them, as well.	8/8/2016 12:33 PM
6	We need more contacts with our clients, more listening to their needs, and more guidance for our clients in providing best practices and helping them meet their strategic business objectives.	8/8/2016 12:30 PM
7	The team is excited about the growth and direction of Mosaic. However, the team still has concerns from the previous quarterly session around hiring, terminations, constant changes and communication. Migrating to the new tools caused a lot of havoc and pain. Consultants have been very busy working hard to maintain 80% utilization during the cyclical of this industry. Some team members are at the brink of burn out on activations feeling like Ultimate sends us the "bad pile". As for the huddles, many team members do not see the added value. They see it as a distraction when they are heads down working and have to stop for 10-15 minutes. The team has expressed dislikes with Zoom (lack of features); many are opposed to the video feature for every conversation/meeting. The accountability across the organization is not the same for everyone.	8/8/2016 11:50 AM
8	Periods of Chaos: trying to resource & schedule existing work while estimating availability for incoming requests without firm or even loose dates for large, existing projects. Information on projects is in silos. We huddle about what's up; but not enough about the work. I preferred having daily huddles with teams or project teams where we could 'walk the work', share what we know about timelines and stay informed of responsibilities so we don't fall behind, miss something entirely, or get a surprise 'this needs to be done' tomorrow. What's Up huddles are great for sharing ideas, getting some help, or having a forum to share something valuable to the entire group. But mostly it still seems like to-do lists, even after reminders not to put a to-do list. I think that's a sign that that type huddle isn't working for us; and it is a drain on utilization.	8/8/2016 11:31 AM

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9	I am thrilled to have such a great new member added to our Payroll Team! We all work so well together and back each other up when ever needed. Having the sense of knowing that you have their back as well as them having yours is priceless!	8/8/2016 11:23 AM
10	So far, the feel of the team seems to be good. It seems that we are growing at a very rapid pace which means more work for everyone.	8/8/2016 11:22 AM
11	I think the payroll team this past quarter has had a major improvement to the 'feel' of the team; We are all in sync with each other and I think our internal communication with each other has improved.	8/8/2016 11:17 AM
12	N/A	8/8/2016 10:55 AM
13	A lot of change (both additions and subtractions) leads to some general uneasiness and confusion, but we seem to have an adaptable and proactive group -- allowing for continued forward progress.	8/8/2016 10:54 AM
14	I'm struggling to figure out who "my team" is exactly. I realize our consultants are our bread and butter but it seems to me that if you are not a consultant you're not a member of the larger team.	8/8/2016 10:50 AM
15	The feel of the team is great! Everyone has been very helpful and I feel like part of the team even though we're not in the same office.	8/8/2016 10:28 AM
16	10/10 so far!	8/8/2016 9:46 AM
17	The team is overwhelmed and their patience is stretched thin. Utilization will not show this, but I can definitely tell when I reach out to people. The conversations are not the same. I can feel the stress and the weight that others are carrying, and it should not be that way. I can see two things contributing to this: unattainable goals and constant organizational changes. It is very difficult for the team to see the light at the end of the tunnel because we change trains at every stop. We need to redefine our sense of urgency - every issue does not warrant a crisis-level response, but much too often, this is how we treat everything. It is exhausting and the team is feeling that pressure now more than ever before. Also, we need to be very deliberate in our technology strategy moving forward. There have been way too many changes to the tools that we use, and those changes have not produced successful results. I personally do not see the benefit in switching our communication technology to Zoom. It is not user friendly nor does it provide any advantages over Join.me or Skype for Business. We have also experienced numerous challenges with e-mail since migrating to Office 365 from Intermedia which has caused a lot of grief for a lot of people in the company. This needs to be fixed once and for all - not a knee jerk reaction that treats the symptoms, but a well-planned and executed technology strategy that resolves the issues and is sustainable as we continue to grow. Also, the huddle does not work for us - how much longer are we going to continue to try to fit these square pegs into these round holes? We are trying to make something happen that just does not fit our company. We just participate in it now because we have to, there is no value in the huddle at all. If anything, the revised, combined huddle has diluted the team synergy.	8/8/2016 9:34 AM
18	I think the team still has some concerns left over from the previous quarter around hiring, terminations and communication. Some Consultants are on the brink of burnt out on activations and feel like Ultimate sends us the "bad pile".	8/5/2016 8:30 AM
19	The team atmosphere at Mosaic is amazing, during the interview process the team dynamic was brought up time and again. It's refreshing to see a company that is so invested in their employees.	8/3/2016 10:34 AM
20	It is hard to say there are a lot of new employees that I haven't met yet. Turnover seems to be high as well this quarter.	8/2/2016 10:41 AM
21	The company is energized and ready to sprint forward after vacations and the global services meeting.	8/1/2016 5:20 PM
22	I think the team feels great, it's been a busy quarter (although I remember hearing that it was supposed to be our "slow" quarter)! I think we learned a lot from the may meeting and have been able to move forward and continue wowing our team and our clients	8/1/2016 4:55 PM
23	The team is overwhelmed and their patience is stretched thin. Utilization will not show this, but I can definitely tell when I reach out to people. The conversations are not the same. I can feel the stress and the weight that others are carrying, and it should not be that way. I can see two things contributing to this: unattainable goals and constant organizational changes. It is very difficult for the team to see the light at the end of the tunnel because we change trains at every stop. We need to redefine our sense of urgency - every issue does not warrant a crisis-level response, but much too often, this is how we treat everything. It is exhausting and the team is feeling that pressure now more than ever before.	8/1/2016 4:49 PM
24	The feel of the Premier Support team is truly a Team. I think the May Meeting really helped to connect us even more. And Tiffany just keeps it all working so smoothly for us. As an organization, there has been significant growth since May. I'm sure in time I will get to know and connect with each of new hires, but at this time it's a little confusing who is who. lol	8/1/2016 2:30 PM
25	My team is doing well overall. We have a routine in place and good flow in place. It is nice that we have been stable for a while.	8/1/2016 2:20 PM

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26	n/a	8/1/2016 2:04 PM
27	Antoinette is settling in well, and things are just ducky.	8/1/2016 1:50 PM
28	There is still concern among the team regarding low utilization while additional new team members are being hired. There appears to be inequity of work spread across the team members.	8/1/2016 11:21 AM
29	i think the overall feel of the team was positive. The last two months were slow, I don't really have any input here.	8/1/2016 10:44 AM
30	So far, I've noticed the team I've been assigned to is very helpful and doesn't mind taking time out of their busy schedule to assist one another!	7/29/2016 3:49 PM
31	Feel a bit of uneasiness about organizational changes but that is normal and if managed properly, with open communications, this will pass.	7/29/2016 1:57 PM
32	Positive: we are 100% committed to our values and culture, so I think that energizes the team Negative: we are still working to get enough work to fill our capacity (even though I realize we are coming out of the summer months), which has an impact on our team members	7/29/2016 11:14 AM
33	I LOVE the Mosaic Team! The teamwork aspect is always very prominent. We always know we can count on one another for assistance.	7/29/2016 11:03 AM
34	Last quarter, my comment here surrounded the splurge of terminations that were occurring in the organization. I think the transparency of our leaders, Vicki included, has really put my mind at ease. I always had a fear that one day I would try to log in and it just wouldn't work and that would mean my time was done. Understanding that there is a process and no one is ever surprised helped. I am still disappointed in the structure of the daily huddles. Although they are more rapid, I still think a lot of time is spent on a to-do list. I'm glad to see the word of the day is no longer part of it. I am just as guilty of the to-do list, but I don't know what else to say. The "good" examples that Kelsey shares still seem like to-do lists. If we should share more about our family and personal lives here, I'm all for it. Maybe it would make us more like a team if we knew someone was learning to drive or having their first day of school. Also regarding Huddles, it's nice to see Vicki on the calls now! I love seeing you each day and it helps me (and hopefully others) not feel so distant. I think it makes you seem more approachable and available because we see you more regularly. Last concern - make sure we do not have too many consultants if work cannot support it. It's hard to hear that we may lose Club this year because numbers are so low. Those that deserve Club work so hard and it would be terrible for them to miss that opportunity because we were light on workloads.	7/29/2016 9:34 AM
35	It feels crazy from the perspective of so many new people; new jobs created and I don't understand what their actual roles are or who they report to; the company is extremely Administrative top heavy; utilization is low and company wide goal of 80% does not appear to be obtainable	7/29/2016 9:12 AM
36	I think there is a better understanding of how important servicing our clients relates to our organization's success. Everyone is very helpful to one another. I feel the focus in this quarter on creating our guidelines will improve our ability to move more work through our pipelines.	7/29/2016 7:47 AM

Q3 Lessons Learned: During the past period/quarter what are the losses, struggles and disappointments that occurred, and more importantly, what did you learn from those events that should be shared with the entire organization?

Answered: 29 Skipped: 7

#	Responses	Date
1	Owning it has been a struggle this quarter. I feel it's not necessarily a blame game but more excuses after excuses. It is easier to assist with a project when someone is completely transparent instead of making up excuse after excuse why it is not complete. Touching base with people here and there is great, but sometimes I feel that I am "nagging" people because I am getting no communication from them. They have either not started a project or are behind and do not want to admit it??? Personally I know owning it is one of our hardest core values for me, but when I do, things go so much smoother! Own it when you are behind and need help because I know from experience many people will be willing to lend a hand!	8/9/2016 11:06 AM
2	We need to hire slowly and fire quickly. Losing Candice was painful but we learned a lot about what our PM's do/don't do or should do/don't do.	8/8/2016 3:44 PM
3	I think we need to move back to the email server. I have been embarrassed far too many times due to dropped email, sluggish response times and hung up outboxes. There are too many tools and Salesforce is constantly messing up expenses. I am spending far too much time on expenses in the system and having to toggle between Salesforce, Sharefile, my personal folder of record, and IM's to ensure that things are submitted on my side but I still get told they are incorrect. I do not wish to argue about expenses or time when I am traveling several times a month and trying to manage so many systems. I think if someone can assist the consultants with the expense entry, a clerical position or intern, it would be nice.	8/8/2016 3:00 PM
4	We are starting to hire more people with the same first names - be careful who you are emailing!	8/8/2016 12:33 PM
5	Check references on all new hires. Make sure new hire's skills and abilities match their resume.	8/8/2016 12:30 PM
6	Mosaic moves like lightning speed and often does not think things through. We need to slow down and not treat every action or task as life threatening. There is opportunity for improvement regarding quarterly & annually priorities, resourcing & planning, forecasting & staff planning management. At times, Mosaic focuses on things that are not as important as others.	8/8/2016 11:50 AM
7	I learned to trust my instincts.	8/8/2016 11:31 AM
8	I have learned that always using the "4-eye" system is the best way to go. We are all human and cannot expect to be perfect all of the time. Just let a team member do a quick review to help catch errors that you may have overlooked.	8/8/2016 11:23 AM
9	Having a hard time with expenses being tracked. Would like a better system or better communication around expenses and when they are due.	8/8/2016 11:22 AM
10	N/A	8/8/2016 10:55 AM
11	Struggles with overall expectations and team communication were apparent at the beginning of the quarter. In particular I learned that what may seem obvious to one person (or group) may in fact be the opposite for another person (or group), and that the communication of seemingly simple details and the systematic sharing of information is paramount as we continue to grow.	8/8/2016 10:54 AM
12	I've been working on training so I don't feel like I had any losses or disappointments.	8/8/2016 10:28 AM
13	N/A	8/8/2016 9:46 AM
14	For the past year, we have been in a massive rush to "grow" and make changes. From systems changes to personnel moves, decisions have been made that have left a lot of us questioning the why, the how and the what behind them. Additionally, the CEC guidelines have been a huge waste of time and effort - the time should have been spent organizing what we already have versus crafting "new" standards - a lot of rework with no real direction of how these will be adopted, applied and maintained. Overall, it has been very frustrating; however, I realize that I need to be more vocal and challenge the process in a productive, meaningful way.	8/8/2016 9:34 AM

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15	Mosaic moves like lightening speed and sometimes does not take time to think things through from end-to-end. We are an ambitious group and one that is passionate about what we do. However, we lose sight of the "main thing" and sometimes focus on things that are not as important as others. We need to do a better job at prioritizing, forecasting, planning, etc.	8/5/2016 8:30 AM
16	I wasn't here for last quarter, so no input on this question.	8/3/2016 10:34 AM
17	I feel it is important to set client expectations up front - felt some issues with clients where I was committed to without my input.	8/2/2016 10:41 AM
18	I think setting quarterly priorities has been a struggle, it sometimes feels like we are left to our own devices for setting our own priorities, isn't that something that our managers should set for us?? It also feels like some jobs are more "priority" or "project" oriented than others, sometimes the priority is just to take care of the work that comes in.	8/1/2016 4:55 PM
19	For the past few quarters, we have been in a rush to do things. From systems to personnel moves, decisions have been made that have left a lot of us wondering why and how we got to these outcomes. For example, the decision to introduce yet another incomplete tool into our repository required some additional thought and vetting out. Zoom provides us with video conferencing abilities, which in my opinion is overrated. This functionality was available with Join.me and Skype for Business, but was never fully explored. For everything that Zoom offers, it takes away something else. We have stepped back light years with our Instant Messaging capabilities -- in a company that is nearly 50% virtual, that is a huge loss. Zoom does not plug into our e-mails, so we are not able to fully gauge the availability of our counterparts. This tool just doesn't work. I have learned that we need some	8/1/2016 4:49 PM
20	Nothing significant comes to mind.	8/1/2016 2:30 PM
21	For the few changes that have happen, I have learn that being flexible helps out a lot. That our teammates are available and willing to help out.	8/1/2016 2:20 PM
22	n/a	8/1/2016 2:04 PM
23	We still need to commit to our tools. I am hearing once again that we need to find a place to warehouse our documentation - can we just pick one and stick with it?	8/1/2016 1:50 PM
24	I think we start strong on projects but don't finish strong. Cleaning up the few outstanding tasks that keep a project open are time consuming on follow-up and escalation.	8/1/2016 11:21 AM
25	We need to create a sense of URGENCY when we have: - available capacity - client needs - communication requests (clients and internal)	7/29/2016 11:14 AM
26	We are need of some more structure in policies/procedures. There were no significant disappointments in my view.	7/29/2016 11:03 AM
27	Activations seem to be a rough spot. I know there are some painful ones going around right now. I hear the excuse "they're all like this" too much and we need to do what we can do not let them become "like that". My fear is that over time, Mosaic will become like Ultimate is with activations. We should strive to do them better and not just accept that they are terrible. They put a huge strain on the company financially but also the individual employee and their general well being.	7/29/2016 9:34 AM
28	Leave no stone unturned even if you think "there is no way to do that" make sure "there is no way to do that" enlist the help of Dave and Ryan to determine if things beyond your wildest imagination are possible. Always give several options on how it can be done.	7/29/2016 9:12 AM
29	Sometimes telling a client no can turn into a yes. Doing work outside of scope may help the client, but it doesn't help our organization. Learning to say no can ultimately mean that we get a yes on additional billable work.	7/29/2016 7:47 AM

Q4 Outstanding Players: From your perspective, who are the team members that have stood out this period/quarter as outstanding players? And why do they deserve recognition?

Answered: 34 Skipped: 2

#	Responses	Date
1	Ceci- Does a great job helping out wherever needed, even if it's not in her "job description" and she happily does it! Andy- So patient with all the computer/outlook issues and always has a quick response! Meadow/Denise- Thank you for everything you both are doing with HR, I know it has been a battle but you both are amazing and always there to answer any questions regarding HR matters. Mike- Pioneering the Mosaic Client Experience!	8/9/2016 11:06 AM
2	Michael Barron. Always there for you.	8/9/2016 10:57 AM
3	Dave for closing an incredibly amount of sales. Mike W for pushing the MCE program forward. Shannon and Ceci for for being such enthusiastic proponents of the MCE program. Ceci again for making all of our stuff look so good! Denise and Meadow for all of their recruiting efforts.	8/8/2016 3:44 PM
4	I enjoy working with everyone on the team. Those that have assisted me the most this quarter with clients have been Nalani, Tiffany, Ryan, Cheri, Mike B, Jack, Jason, Carissa, Kim, Jared, Amanda, Chris M and Aimee. They each have lived the core values of Mosaic with our interactions and the client interactions and I am so glad that we are team mates.	8/8/2016 3:00 PM
5	ANDY! He is ALWAYS ready to be available and take immediate action.. with any project! Nothing is beneath him, and no project is too small for him. Thanks Andy!!!	8/8/2016 12:33 PM
6	Great client feedback re: Jason, Jack, Cheri, Jared, Alex, Chris, Mike B, Aimee Internal rave reviews for Ceci and Andy Denise E and Meadow: Awesome job recruiting and on-boarding!! Dave and Shannon: Sales!	8/8/2016 12:30 PM
7	Ceci - thank you for taking Mosaic's brand to the next level Rachel & Sarah - for all your hard work behind the scenes to make it all happen Michael - sincerest thanks for all your help Tiffany - love you on the team, such a great spirit Dave - for knocking it out the ball park Functional & Technical Team - for always making a difference and inspiring confidence in our customers and within the team	8/8/2016 11:50 AM
8	Nalani Cobb for always being update and easy to work with	8/8/2016 11:31 AM
9	Aimee Morgan - She is always there to help us when we have questions or need her expert advice or knowledge on an issue.	8/8/2016 11:23 AM
10	Jack is always an absolutely phenomenal team player. He is always available and willing to help in any way that he can. Nalani Cobb is also my outstanding team player.	8/8/2016 11:22 AM
11	Lisa Mathis is always a great manager, but this past quarter she has been a rock star with the payroll team! She helped bring us back from a bad situation (past employee) and has really helped us to all get back in sync. She also kicked major butt on the payroll's CEC guidelines.	8/8/2016 11:17 AM
12	N/A	8/8/2016 10:55 AM
13	Consultants and Consulting Managers (hard to narrow down to specific individuals)	8/8/2016 10:54 AM
14	Dave and Shannon have been a great addition to the team. They are committed to us, our growth and our clients. Denise E. and Meadow have really made huge strides in our own HR department. Great job! Wonderful to have you here! Ceci continues to be amazing!	8/8/2016 10:50 AM
15	The consulting management team has been outstanding; from providing training information to simply calling to welcome me to the team. Meadow has also been great about following up with benefits.	8/8/2016 10:28 AM
16	N/A	8/8/2016 9:46 AM

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17	Alex Faulk: There is a reason why she is our current, reigning MVP. Andrew Stewart: He is just great with our clients and shines a positive light on Mosaic. He just owns the client experience. Meadow Baldwin: She hit the ground running and has not looked back. She just came in and immersed herself in all things HR and Mosaic. Excellent job! Dave Burkitt: Best Mosaic hire this year! His business acumen and industry knowledge is vital for our growth and development as an organization. He just gets it, and we are very lucky to have him. Jack Hufnagle: Jack just understands what top-notch service means, and he delivers it every time --whether it is for internal or external clients. Cheri Wadlington: Cheri = Teamwork. Enough said. Ceci Spehar: Ceci has done an excellent job branding the company. Ceci is a our cheerleader! Nalani Cobb: She deserves so much more credit than she gets - she truly represents the Mosaic duck in every way.	8/8/2016 9:34 AM
18	Ceci - thank you for taking Mosaic's brand to the next level. You are awesome! Tiffany - Michael - Dave -	8/5/2016 8:30 AM
19	I've only been here a short period of time and have had minimal interaction with anyone outside of my department.	8/3/2016 10:34 AM
20	Michael has been quick to respond and his system expertise is always much appreciated.	8/2/2016 10:41 AM
21	Everyone has been an outstanding player this quarter! The entire team rallied together, it's felt really connected and well balanced this whole quarter. Denise Egan, Dave and Shannon have been so busy with hiring a ton of people and bringing on so many deals, and the entire team has been able to support this rapid internal and external growth! I think we all deserve a pat on the back.	8/1/2016 4:55 PM
22	Nalani Cobb: ALWAYS the duck. Takes whatever is thrown at her (and it is a lot) and just keeps paddling. A true asset to Mosaic in every way. Andrew Stewart: A true Mosaic brand ambassador. He shines a wonderful light on Mosaic and is excellent with our clients. Andrew is someone that you never have to worry about putting in front of a client - you just give him a task and it's done...and done extremely well. Embodies our "OWN IT" value to the fullest. Meadow Baldwin: She hit the ground running and has not looked back. She just came in and immersed herself in all things HR and Mosaic. Excellent job! Dave Burkitt: I cannot say enough about how Dave has come in and put structure around our business development efforts and pipeline. He understands the different aspects of the business, which is so critical in the role and capacity that he is in. He has done an excellent job since coming onboard, a critical piece of the executive leadership team. Jack Hufnagle: Wow, Jack...just wow. Tyler Wichelhaus: He has done a fantastic job of creating long-term client relationships and additional business opportunities for Mosaic. Cheri Wadlington: There is a reason why she won the Teamwork award this year - she exudes teamwork. She lives to help others, and she sets a wonderful example for other Mosaicians to follow. I can reach out to Cheri for anything, and if she does not have the answer, she will find it. I feel very supported having her on the Mosaic team.	8/1/2016 4:49 PM
23	I should just list the entire Mosaic team here! But special Kudos to Alex, Ryan, Jack, Mike Brent, Diana, Jared, and Jonathan for always jumping to my rescue when I raise my hand.	8/1/2016 2:30 PM
24	Jason: For picking up the gaps that were created when Randall left. Andrew, Kim, Carissa, Alex, and Cheri: For being on the front lines with the client. Always available and willing to assist.	8/1/2016 2:20 PM
25	n/a	8/1/2016 2:04 PM
26	Jonathan - you could almost say that Manifest files were his manifest destiny.	8/1/2016 1:50 PM
27	Dave Burkitt has been very responsive to questions and issue escalation. Jared always makes a positive impression on his clients. He goes the extra mile to WOW them and thank them for being a Mosaic customer.	8/1/2016 11:21 AM
28	Sarah Bolen. She has grown tremendously this past quarter and I don't think she gets enough recognition for it. Very proud of her!	8/1/2016 10:44 AM
29	Meadow Baldwin	7/29/2016 1:57 PM
30	Andy - I believe he is owning the problems we bring to him and is working diligently to resolve them, because the solutions can be complex with our environment (office, home networks, ISPs, etc) Sarah - She is doing a great job with her daily tasks and has stepped up to also assist with our AR process. It is a tremendous help.	7/29/2016 11:14 AM
31	Andy Ferguson. He had some real challenges to face as he took on new tools and converting us to them. He also had to on-board 6 new hires rapidly and ensure all equipment and tools were in place. He is SUPER responsive and works very hard to answer team members and resolve the issues quickly.	7/29/2016 11:03 AM
32	Jack and Jason are amazing! I am so happy to see they are finally getting the help they need. I tell clients "these guys live and breathe Ultipro and SQL" and when we send them a project, it will be done with amazing accuracy. Jack and Jared rocked the TowneBank merger. I think we have a forever client on our hands. Cheri has done an awesome job with Sunstate and made them more self sufficient. A year ago, I wasn't sure that was possible. Anyone on an activation right now, you take a lot of heat and a lot of beat and you are appreciated. Leadership team, thank you for assembling such an awesome team.	7/29/2016 9:34 AM
33	Dave Burkitt is a great resource to have on our team; it is really nice to have someone to engage with the clients management team and relay difficult messages. Ryan is always awesome and always has great advice on best approaches and what "will work" Carissa does such an amazing job of keeping the projects organized and on track	7/29/2016 9:12 AM

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34	Dave Burkitt. I respect him a lot! He is driven, approachable, helpful, pointed at times but helps us all to understand the big picture. He is a huge believer in making sure we do what we say we are going to do! He coaches me during difficult situations and provides feedback to help me out. He shares his experience with the team and handles the clients very professionally. He has become a mentor to me even if he doesn't know it.	7/29/2016 7:47 AM
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**Q5 Planning For Next Period/Quarter:
Company Priorities** What are the 3 things that the COMPANY must do in the next period/quarter to move the organization forward? Take the necessary time to think about next period/quarter and what are the most important things for the organization to accomplish. Think beyond just your department.

Answered: 30 Skipped: 6

Answer Choices	Responses
Company Priority #1	96.67% 29
Company Priority #2	90.00% 27
Company Priority #3	83.33% 25

#	Company Priority #1	Date
1	Mosaic Client Experience	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	Utilization	8/8/2016 3:48 PM
4	Have a better grasp on expense issues	8/8/2016 3:30 PM
5	Project Management - Migration to Clarizen	8/8/2016 12:58 PM
6	Year-end prep	8/8/2016 12:39 PM
7	Utilization	8/8/2016 12:31 PM
8	Implement Resource Planning Tool	8/8/2016 11:51 AM
9	Retain current Clients as well as getting new Clients	8/8/2016 11:49 AM
10	Design the Clarizen landscape; i.e configure the system to hour business processes	8/8/2016 11:33 AM
11	N/A	8/8/2016 10:56 AM
12	Clarizen implementation	8/8/2016 10:50 AM
13	I'm not sure I've been here long enough to come up with these.	8/8/2016 10:47 AM
14	N/A	8/8/2016 9:48 AM
15	Developing a 1-3 year Organizational Roadmap	8/8/2016 9:45 AM
16	Implement Resource Planning Tool	8/5/2016 8:32 AM
17	Even out utilization as much as possible	8/2/2016 10:45 AM
18	Create company goals that cascade to departments and individuals.	8/1/2016 5:20 PM
19	Continue supporting/working on the CEC	8/1/2016 5:01 PM
20	Continue to provided and improve the tools the consultants use on a daily basis	8/1/2016 2:34 PM
21	Utilization balance	8/1/2016 2:33 PM
22	n/a	8/1/2016 2:04 PM
23	Commit to previous priorities - if they aren't completed, complete them	8/1/2016 1:54 PM

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24	Project and resource management tool	8/1/2016 11:22 AM
25	Implement OPS Management Tool	7/29/2016 11:40 AM
26	Implement clear processes for on-boarding/recruiting new hires	7/29/2016 11:15 AM
27	Redefine Huddles	7/29/2016 10:06 AM
28	YTD Utilization of 80% company wide	7/29/2016 9:27 AM
29	CEC Guideline - must stay in play. IT won't be perfect this first go around.	7/29/2016 7:58 AM
#	Company Priority #2	Date
1	Playbook Adoption	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	MCE adoption	8/8/2016 3:48 PM
4	Better understanding of all the tools that are available to the team.	8/8/2016 3:30 PM
5	Improve Digital Media Presence	8/8/2016 12:58 PM
6	Orientating new hires more fluidly	8/8/2016 12:39 PM
7	Ops Mgt Platform Implementation	8/8/2016 12:31 PM
8	Activation Playbook in Use	8/8/2016 11:51 AM
9	Employee Retention	8/8/2016 11:49 AM
10	Ramp up new hires for the upcoming 'busy season'	8/8/2016 11:33 AM
11	Continued commitment to the CEC - processes	8/8/2016 10:50 AM
12	same	8/8/2016 10:47 AM
13	N/A	8/8/2016 9:48 AM
14	Implementing and Adopting the Activation Playbook	8/8/2016 9:45 AM
15	Activation Playbook in Use	8/5/2016 8:32 AM
16	Build the team - lots of new hires and turnover	8/2/2016 10:45 AM
17	Implement Clarizen as our project tracking, forecasting, and resource management tool.	8/1/2016 5:20 PM
18	Junior consultant training	8/1/2016 5:01 PM
19	Growth. Too much? Or do processes in place need to be adjusted?	8/1/2016 2:34 PM
20	One universal case system with ease of use	8/1/2016 2:33 PM
21	Revisit old priorities - what is the status? Does it still work?	8/1/2016 1:54 PM
22	Utilization review	8/1/2016 11:22 AM
23	Drive Utilization back above 80% YTD	7/29/2016 11:40 AM
24	Improve Mosaic's UltiPro environment and add information to the Home Page for clients as an example	7/29/2016 11:15 AM
25	Fix Activations	7/29/2016 10:06 AM
26	Make sure YTD Financial goal is being met	7/29/2016 9:27 AM
27	Systems and software that work all the time - aka (outlook issues, resource mgt tool)	7/29/2016 7:58 AM
#	Company Priority #3	Date
1	Mentoring Program	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	Ops tool implementation	8/8/2016 3:48 PM
4	Update time recording tools to make it easier to see the projects that are assigned to you.	8/8/2016 3:30 PM
5	Organize Shared File Folders - ShareSync	8/8/2016 12:58 PM
6	CEC Guideline revisions and final documents into action	8/8/2016 12:39 PM

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7	Visibility	8/8/2016 12:31 PM
8	Continue to work on CEC Guidelines	8/8/2016 11:51 AM
9	Growing Revenue	8/8/2016 11:49 AM
10	Hire another payroll account specialist	8/8/2016 11:18 AM
11	Client survey tool to gain their perspective on our performance	8/8/2016 10:50 AM
12	same	8/8/2016 10:47 AM
13	N/A	8/8/2016 9:48 AM
14	Developing an Employee Engagement and Career Pathing Strategy	8/8/2016 9:45 AM
15	Continue to work on CEC Guidelines	8/5/2016 8:32 AM
16	Build an identity - are we becoming too much like Ultimate Software?	8/2/2016 10:45 AM
17	Implement Netsuite as our accounting tool.	8/1/2016 5:20 PM
18	Chain of Command for work flow.	8/1/2016 2:34 PM
19	Apparently, more space...	8/1/2016 1:54 PM
20	Continue UltiPro Training	8/1/2016 11:22 AM
21	Begin using MCE Guidelines and measuring	7/29/2016 11:40 AM
22	Clear communications surrounding changes within Mosaic	7/29/2016 11:15 AM
23	Visibility of Decisions	7/29/2016 10:06 AM
24	Rollout a tool that makes time keeping, expenses and billing easier for everyone	7/29/2016 9:27 AM
25	Staffing for growth	7/29/2016 7:58 AM

**Q6 Planning For Next Period/Quarter:
Individual Priorities** What are the 3 things that YOU must do in the next period/quarter to move the organization forward? Take the necessary time to think about next period/quarter and what are the most important things for YOU to accomplish. Be specific with your answers. We ask you to begin thinking of these now and we'll finalize them the day of planning. Bring your thoughts with you and you will build upon them during our session.

Answered: 26 Skipped: 10

Answer Choices	Responses	
Individual Priority #1	100.00%	26
Individual Priority #2	84.62%	22
Individual Priority #3	73.08%	19

#	Individual Priority #1	Date
1	CEC guidelines entered into OPS tool	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	Increase contact with USG SAM's/CRM's	8/8/2016 3:48 PM
4	Become better organized and find some tools to assist with that	8/8/2016 3:30 PM
5	Digital Media Production (against calendar)	8/8/2016 12:58 PM
6	FPC certification	8/8/2016 12:39 PM
7	Ops Mgt Platform Implementation and Adoption	8/8/2016 12:31 PM
8	Continue with UltiPro Training	8/8/2016 11:49 AM
9	TBD	8/8/2016 11:33 AM
10	Qualify for 9310 course; take & pass 9310 course at Ultimate	8/8/2016 11:18 AM
11	N/A	8/8/2016 10:56 AM
12	Complete the necessary training to become UltiPro certified.	8/8/2016 10:47 AM
13	Complete Training	8/8/2016 9:48 AM
14	Get utilization up to 85%	8/2/2016 10:45 AM
15	Ensure that all Services personnel are using Clarizen correctly by 12/1/16.	8/1/2016 5:20 PM
16	Advancement on new website copy	8/1/2016 5:01 PM
17	Improved my daily process	8/1/2016 2:34 PM
18	Utilization at 85%	8/1/2016 2:33 PM
19	Learn Ultipro Better	8/1/2016 2:04 PM
20	Learn the basics of Project Management, and the tools needed	8/1/2016 1:54 PM

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21	Develop/utilize additional templates for project management	8/1/2016 11:22 AM
22	Secure NetSuite Invoicing with Clarizen	7/29/2016 11:40 AM
23	Cleaning up Mosaic's UltiPro environment/Homepage	7/29/2016 11:15 AM
24	Caution Burnout - set stricter hours for work time for more ME/FAM time	7/29/2016 10:06 AM
25	85% YTD Utilization	7/29/2016 9:27 AM
26	Cascade the CEC guidelines to the teams	7/29/2016 7:58 AM
#	Individual Priority #2	Date
1	Support for AR	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	Develop plan to retool the Mosaic GL Tool	8/8/2016 3:48 PM
4	Work on recording my time on a daily basis	8/8/2016 3:30 PM
5	Develop Digital Media Analytics Reporting Plan	8/8/2016 12:58 PM
6	Move Invoicing to NetSuite	8/8/2016 12:31 PM
7	To obtain my CPP	8/8/2016 11:49 AM
8	TBD	8/8/2016 11:33 AM
9	Begin taking on projects	8/8/2016 10:47 AM
10	Absorb all the knowledge I can on Mosaic	8/8/2016 9:48 AM
11	Build knowledge of additional products (time, comp, performance, etc)	8/2/2016 10:45 AM
12	Develop and document standardized services processes for usage with Clarizen by 12/1/16.	8/1/2016 5:20 PM
13	templates, templates, templates	8/1/2016 5:01 PM
14	Help improve my coworker' skill set.	8/1/2016 2:34 PM
15	Develop UTM standard BI reports	8/1/2016 2:33 PM
16	Learn my Role	8/1/2016 2:04 PM
17	Pick up more Business Intelligence knowledge	8/1/2016 1:54 PM
18	Maintain client expectations	8/1/2016 11:22 AM
19	Publish the MCE Guidelines and get them into use	7/29/2016 11:40 AM
20	Build HRO Team guidelines for Client Engagement	7/29/2016 11:15 AM
21	Take at least 2 training classes	7/29/2016 9:27 AM
22	Perfecting our service delivery	7/29/2016 7:58 AM
#	Individual Priority #3	Date
1	Internal training	8/9/2016 11:06 AM
2	Do not know	8/8/2016 4:19 PM
3	Incorporate MCE guidelines into Clarizen	8/8/2016 3:48 PM
4	Improve on my intercompany interactions	8/8/2016 3:30 PM
5	File Sharing Tool (ShareSync) Intro & Setup	8/8/2016 12:58 PM
6	Deploy Expense Mgt Tool	8/8/2016 12:31 PM
7	Gain more Excel knowledge	8/8/2016 11:49 AM
8	TBD	8/8/2016 11:33 AM
9	Work towards at least 80% utilization	8/8/2016 10:47 AM
10	Absorb all the knowledge I can on Ulti	8/8/2016 9:48 AM
11	Identify and adopt a master repository for project documentation by 12/1/16.	8/1/2016 5:20 PM

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12	The Mosaic Client Experience support and roll out	8/1/2016 5:01 PM
13	Continue to learn the Dashboard process	8/1/2016 2:33 PM
14	Learn the difference between US and Canadian payroll	8/1/2016 1:54 PM
15	Increase knowledge of Talent/Comp modules	8/1/2016 11:22 AM
16	Support sales efforts and metrics to ensure we are on right track	7/29/2016 11:40 AM
17	Streamline HR Processes and Guidelines	7/29/2016 11:15 AM
18	Assist with one of the overall Corporate Goals	7/29/2016 9:27 AM
19	Doing what I say I'm going to do	7/29/2016 7:58 AM

Q7 Anything additional that you would like to see from the Petra team to make your planning day a better experience overall?

Answered: 14 Skipped: 22

#	Responses	Date
1	More time for open communication. I feel last meeting things came up and never really got fully talked about. People went away still holding on to things, and that made a rough couple of following weeks.	8/9/2016 11:06 AM
2	Allow the discussions that need to occur, happen organically. It always feels rushed and we leave feeling as though our voice really wasn't heard, it was taking too long.	8/8/2016 4:19 PM
3	Not at this time	8/8/2016 3:30 PM
4	More "Team" activities	8/8/2016 11:49 AM
5	N/A	8/8/2016 10:56 AM
6	No	8/8/2016 10:47 AM
7	N/A	8/8/2016 9:48 AM
8	I would love to see Petra incorporate time into the planning session to review past quarterly priorities.	8/8/2016 9:45 AM
9	I felt like the previous meeting in May, we often got away from the point of the meeting. I know the meeting discussion are suppose to be open, but I feel like there should be some control to keep the meeting flowing and on track.	8/1/2016 2:34 PM
10	n/a	8/1/2016 2:04 PM
11	It would be great if those of us who aren't there have a way to watch the high points of Petra Day. Live streaming is a bit much, but maybe record some of it?	8/1/2016 1:54 PM
12	Spend more time discussing company priorities and what we are trying to accomplish as opposed to being rushed into developing task steps with dates.	8/1/2016 11:22 AM
13	The leadership team should come to the planning day and cascade down the priorities for the quarter and the next 3 QTRs. We can then discuss and ensure we are all aligned.	7/29/2016 11:40 AM
14	If the team is passionate about a topic please let us run with it; in the last planning session I personally felt that several topics were bypassed for the sake of keeping a timeline and it would have been beneficial for us collectively as a team to have the time to discuss some of the topics further. When it is personal goal time it might be beneficial for us to be grouped with our respective teams including our manager so the manager can help us with goal setting that aligns with the Company Goals; in the last planning session goals had to be redone in order to align with Company Goals.	7/29/2016 9:27 AM