

WeCare Governance Card

WeCare Program | Quarterly Business Review (QBR)

Purpose

The QBR is a collaborative, forward-looking meeting designed to strengthen our partnership through open communication and strategic planning. During this session, we will focus on what matters most to you. We will review the key achievements and tangible value delivered over the past quarter, connecting our performance directly to your business outcomes.

This is also our chance to look ahead, discuss your upcoming strategic initiatives, and jointly create a clear, actionable plan for the next 90 days to ensure we are prepared to support your future success. Ultimately, the QBR is a cornerstone of our partnership, ensuring we are consistently working together to achieve your most important objectives.

Roles & Stakeholders Table

Purpose of Attendee Roles

To ensure our Quarterly Business Review (QBR) is both productive and strategic, we assemble a dedicated group of stakeholders from both of our organizations. Each group has a distinct purpose.

- **Mercans Core Team:** The Core Team consists of the key leaders who manage our strategic partnership with you. They attend every QBR to provide consistent oversight, ensure operational excellence, and maintain a deep understanding of your business objectives. Their purpose is to drive the strategic direction of our relationship and serve as your primary points of accountability.
- **Mercans Extended Team:** The Extended Team is composed of subject-matter experts who join the QBR when their specific expertise is needed to address topics on our agenda. Whether it's a deep dive into product development, compliance, or technical integrations, their purpose is to provide specialized knowledge and ensure we can fully support your unique and evolving requirements.
- **Client Representatives:** Your team's participation is the most critical element of a successful QBR. As the key stakeholders in the global payroll program, your representatives provide the strategic context, business priorities, and invaluable feedback that guide our discussion. Your purpose is to ensure our partnership remains perfectly aligned with your goals and to collaborate on a future plan that drives maximum value for your organization.

Mercans Attendees (Core Team)	
Role	Short Role Description
Executive Sponsor	Serves as the senior executive champion for our partnership, ensuring top-level strategic alignment and demonstrating our commitment to your success.
Global Operations Head	Leads our global service delivery teams, ensuring operational excellence, consistency, and quality across all regions we serve for you.
Operations Manager	The expert on our service delivery, here to discuss operational performance and process excellence in detail.
Service Delivery Executive	Oversees the end-to-end service quality to ensure we consistently meet and exceed your expectations.
QCRM Manager	Focuses on the overall quality of our services, ensuring we consistently meet and exceed your standards for excellence.
Senior Process Optimization Manager	Focuses on process optimization to drive efficiency and identify new value-add opportunities for your business.

Mercans Attendees (Extended Team)	
Role	Short Role Description
Product Manager	Provides insights into the product roadmap and gathers feedback for future enhancements to ensure our solutions evolve with your needs.
Support Manager	Oversees the customer support experience and can speak to service trends and opportunities for improvement.
Compliance Manager	A specialist available for deep-dive discussions on specific regulatory landscapes to ensure your compliance posture is secure.
Configuration & Integrations Manager	An expert on the technical setup, available to discuss complex configurations and ensure seamless integration with your systems.

Client Attendees	
Role	Short Role Description
Global Head of HR Operations	The strategic leader overseeing all global HR processes, including the payroll program.
Global Payroll Program Manager	The primary owner of the global payroll program, responsible for strategy, governance, and overall success.
Global Process Owner (GPO) - Finance	The senior finance stakeholder responsible for the financial integrity and control of the global payroll process.
Global Compliance & Risk Lead	Your internal expert on global legal and compliance matters, ensuring the payroll program adheres to all regulations.
HRIS Program Manager	The technical owner of the core HR systems that provide data and integrate with the global payroll platform.
Regional Payroll Leads (e.g., EMEA, APAC)	Represent the specific needs and operational realities of key geographic regions within the global program.

Meeting Agenda & Outcomes

Our Partnership Review: A Collaborative Agenda for Our Upcoming Quarterly Business Review

This agenda is designed to ensure our time together is productive, strategic, and focused on what matters most: your success. Our goal is to move beyond a simple status update and have a forward-looking conversation about how our partnership can continue to deliver exceptional value to your business.

Total Time: 90 Minutes

Part I: Setting the Stage & Aligning on Your Goals (10 mins)

- **Objective:** To begin our conversation with a clear, shared understanding of our purpose and your key business priorities.
- **Agenda Items:**
 - **Welcome & Shared Objectives:** We'll start by briefly reviewing the purpose of our meeting: to celebrate our progress, review the value we've created together, and align on the future of our partnership. We welcome you to share any key topics you'd like to discuss to ensure this meeting is valuable for you.
 - **Revisiting Your "Why":** We'll quickly recap our understanding of the high-level business goals our services support, such as enabling your global growth or enhancing your employee experience. This ensures we remain focused on your core objectives throughout our discussion.

Part II: Service Performance Review (KPIs & SLAs) (15 mins)

- **Objective:** To transparently review our performance against the agreed-upon service metrics and operational commitments.
- **Agenda Items:**
 - **Quarterly Performance Dashboard:** We'll begin with a straightforward and transparent review of our performance against the agreed-upon Service Level Agreements (SLAs) and Key Performance Indicators (KPIs) for the quarter. This provides the factual foundation for our discussion and ensures we are all aligned on the data before discussing its impact.

Part III: The ROI Story: Realized Value & Future Opportunities (20 mins)

- **Objective:** To review the tangible return on investment (ROI) from our partnership and collaboratively identify new opportunities for value creation.
- **Agenda Items:**
 - **From Data to Business Impact:** This is where we move beyond the numbers to tell the story of our partnership. We will connect the KPI and SLA results directly to what they mean for your business—translating our performance into the tangible impact it created, such as time saved, enhanced employee experience, or mitigated compliance risks.
 - **Exploring New Value Opportunities:** Building on our successes, we will explore new ways to enhance the value of our partnership. This can include discussing potential process improvements, introducing new features that align with your goals, or identifying expansion opportunities that can further support your business objectives.

Part IV: Strengthening Our Partnership: A Two-Way Conversation (20 mins)

- **Objective:** To have an open and honest discussion about our collaboration, ensuring we continue to improve and innovate together. Your feedback is the most critical part of this process.
- **Agenda Items:**
 - **What's Working Well:** Let's celebrate the aspects of our partnership that are most effective and discuss how we can build on that success.
 - **Opportunities for Enhancement:** We'll talk openly about any challenges and frame them as collaborative opportunities to strengthen our processes and make our partnership even more effective.
 - **New Ideas to Explore:** This is a chance to brainstorm new ways we can add value, based on your feedback and our shared goals.

Part V: Planning for Your Future Success (15 mins)

- **Objective:** To shift our focus to the future and align our upcoming efforts with your strategic plans.
- **Agenda Items:**
 - **Understanding Your Upcoming Priorities:** We want to listen and learn about your key business initiatives for the next 6-12 months so we can proactively plan how to best support your success.

- **Market & Industry Insights:** We'll share relevant trends and insights we're seeing in the global landscape that may present opportunities or risks for your business, positioning you for what's ahead.
- **A Look at What's Next:** We'll offer a sneak peek at relevant upcoming enhancements and innovations that can support your future growth.

Part VI: Our Joint Commitment & Action Plan (10 mins)

- **Objective:** To conclude with a clear, co-created action plan that outlines our commitments and next steps.
- **Agenda Items:**
 - **Summary of Key Takeaways:** We'll quickly recap the main points and decisions from our conversation.
 - **Confirming Our Shared Action Plan:** We will collaboratively document the specific next steps, assigning owners and timelines to ensure we are all aligned and accountable for moving forward.
 - **Scheduling Our Next Conversation:** To maintain our momentum, we will schedule our next QBR before our meeting ends.

Logging/Archiving the Minutes of Meeting

Streamlining Our Follow-Up: Meeting Minutes & Action Items

To ensure our discussions are captured accurately and lead to clear outcomes, we will use the following process for our meeting documentation.

Meeting Minutes Summary With the Gemini transcript providing a complete, detailed record of our conversation, we will create a concise and formal **Minutes of Meeting (MoM)**. This summary will distill the key decisions, insights, and outcomes from our discussion, making it easy to reference the most important points. The final MoM will be shared with all participants and archived in our central repository for future reference.

Action Item Logging To ensure clear accountability, we will use the transcript to identify and log all **Action Items** discussed during the meeting. Each action will be clearly documented with a specific task, an assigned owner from either team, and a target completion date. This structured action plan will be distributed alongside the meeting minutes, providing a clear roadmap for the upcoming quarter and ensuring all commitments are tracked effectively.