PrestigePEO℠ | WEBINAR Series

Unlocking Mid-Market Opportunities with the PEO Model

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Today's Presenter



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Session Goals



- What Makes a Client Mid-Market
- Why the Small-Business Pitch Falls Short
- Spot the Fit, Lead with the Value
- Protect Your Role
- Common Client Objections
- Mid-Market Needs Specialist

Webinar Forum

- *All participants are muted.*
- *Please type questions in the side navigation panel and we will try to address most questions during today's session.*
- *Today's presentation will be posted online at prestigepeo.com/webinars*

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About PrestigePEO

- Prestige is a Professional Employer Organization, PEO.
- Founded in 1998 by business owners and employee benefits experts to expand service offerings beyond employee benefits for clients requesting HR and compliance support.
- Headquartered in Melville, New York with offices in CA, CO, FL, GA, NC, NJ, TN and VA.
- Licensed to serve clients nationally in all 50 states.
- PrestigePEO is ranked #13 out of over 523 PEOs nationwide*.
- Listed on Inc. 5000 Fastest Growing Privately Owned Companies in America.
- Andrew Lubash, PrestigePEO Co-Founder, Partner and CEO, holds executive positions at the National Association of Professional Employer Organizations (NAPEO).

*Based on payroll processed among NAPEO members.

NAPEO National Association of Professional Employer Organizations

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Our Certifications

PrestigePEO is among only 1% of PEOs that are ESAC accredited, IRS certified and Workers' Comp Risk Management certified, demonstrating our financial stability and exceptional record of adherence to a diverse range of regulatory and security standards.

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Proven Experience

PrestigePEO has the knowledge, depth and experience to implement large, complex accounts effectively, as demonstrated by our current portfolio, which includes multiple clients in the Mid-Market space .

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Project Plan Components

A typical implementation runs four to five weeks (A MID MARKET typically takes 8 or more weeks) . It is organized into weekly tasks covering the components below. The table shows how the scope of each component grows for a larger client.

Component	Small Market-Employee Client	Mid Market-Employee Client
PTO Setup / Accruals	Usually, one or two policies	Multiple policies by class, location and tenure; accrual balances must be loaded and verified for each employee
Time & Attendance	Simple schedules, few supervisors	Many departments, shifts, supervisors and approval hierarchies to configure and test
Custom Reporting (GLs, client-specific)	Basic GL mapping	Complex GL structures across departments, cost centers or entities, plus client-specific reports
Onboarding / I-9s	Small volume; can be removed from workflow if I-9s are on record	High volume of onboarding packets and I-9 verifications to track to completion
Benefit Enrollment	Few plans and enrollments	Multiple plans, classes and carriers; hundreds of enrollments and dependent records to validate
Compliance Review & Setup (SUTA, PFL, State Pay Date, E-Verify)	Often a single state	Frequently multiple states, each with its own registrations, pay date rules and leave requirements
Third-Party Integrations (Exact-Time, Kitchen Sink, Toast, Workable)	Few or none	Multiple integrations that each require mapping, testing and vendor coordination
401(k) Setup & Integrations	Simple census and contribution feed	Larger census, more complex eligibility and contribution data to reconcile with the recordkeeper
Additional Products (ClearCo, ExpensePath, JazzHR)	Limited setup	More users, approval workflows and data to configure

Note: I-9 onboarding can be removed from the workflow if the client already has I-9s on record.

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Your PrestigePEO Team

Our expert HR professionals understand that your employees are your top asset, which is why we're committed to providing one-on-one support – no call centers or chatbots here.

- **Direct Connect** via email, phone, or in-person including support with clients' employees
- **Same-day response** guarantee for urgent situations and everyday support



HR Business Partner



Benefits Specialist



Payroll Specialist



Risk Management Specialist



Retirement Specialist

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What Makes a Client Mid-Market

150 – 2,000 Employees

Headcount is only the starting point.
Complexity is the real indicator.

- **Multi-State**
- **Dedicated HR & Finance**
- **Complex Benefits**
- **Heavy Compliance**

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Mid-Market Space

Market Size

The number of companies in the U.S. with **150 to 2,000 employees** varies significantly by state.

California leads with over 2 million businesses, many of which are in this employee range, given its strong presence in industries like tech, entertainment, and manufacturing

Texas has approximately 1.5 businesses, fueled by its energy, tech, and manufacturing sectors

Florida follows closely, with about 1.6 million businesses, largely driven by tourism, healthcare, and real estate

New York hosts over 1 million businesses, with finance and media sectors prominent

Georgia, Pennsylvania, Illinois, and New Jersey each have between 5,000 to 700,000 businesses reflecting their diverse economies.

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Mid-Market Space

Market Size

The U.S. Mid-Market businesses sector consists of **over 100,000 companies with 150-5,000 employees**

Firms with
150-249 employees
account for around
89,500
businesses

Firms with
250-499 employees
account for around
33,500
businesses

Firms with
500-2,000 employees
account for around
19,300
businesses

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Why the Small-Business Pitch Falls Short

	Small Business	Mid-Market	Enterprise
Decision-Maker	Owner	**Committee**	Procurement
Buying Process	Fast	**ROI-Driven**	RFP
Customization	Standard	**Tailored**	Custom
Internal HR	None	**Stretched Thin**	Specialized

The takeaway: pitch to a committee, not an owner.

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Signals

- Rising renewal costs
- Multi-state exposure
- Growth outpacing HR
- Stretched HR team
- Talent competition

Spot the Fit, Lead with the Value

PEO Value

- Large-group benefits
- Compliance & risk support
- Workers' comp
- Tech & reporting
- HR freed for strategy

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Protect Your Role

Your role stays central

- Clear structure
- You keep the relationship
- Models differ





Common Client Objections

“We'll lose control.” - You keep decisions

“Co-employment risk?” - Clearly defined

“We'll be overlooked.” - Dedicated team

“We already have HR.” - Frees HR

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The Mid-Market Needs Specialists

Why Generalists Fail

1. Complex Setups
2. More Stakeholders
3. Higher Expertise Bar
4. Consultative



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Value-Added Services

- Access to a decided benefits team, HR Specialist, Payroll Expert, and Risk Management Specialist
- No call center—direct, personalized support through phone, email, or in-person meetings
- Same-day response commitment for urgent matters

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KEY TAKEAWAYS

1

Look Past Headcount

Complexity defines mid-market

2

Tailor the Pitch

Committees, ROI, and customization

3

Lead with Signals

Match client pain points to PEO value

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PrestigePEO's Exclusive 2027 Broker Incentive

Earn Your Way to a VIP Experience at the 2027 WM Phoenix Open

WM PHOENIX OPEN

What You'll Experience:

- Two days of admission to the 2027 WM Phoenix Open
- Coliseum Suite access at the iconic 16th Hole
- Bay Club access overlooking the 17th fairway and green
- Complimentary breakfast, lunch, and open-bar cocktails
- Scheduled off-site group dinners
- Hotel accommodations and transportation
- Round-trip airfare when booked through the PrestigePEO event coordinator*

**Airfare will be covered up to $500 for arrivals on Tuesday, February 9, 2027, and departures on Friday, February 12, 2027, when booked through the PrestigePEO event coordinator. Additional limitations and program terms apply.*

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Comments
Discussion?



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Human Resources, Employee Benefits, and Payroll Simplified

You started your business because you had a great idea. We started our business to handle the rest.