

CASE STUDY

HR & Operations Support for a Medical Services Company



Company Details

Industry: Professional medical services / growing operating company

Size: Multi-state workforce

Stage: Scaling headcount, systems, and leadership infrastructure

Geography: CA, TX, MA, NC + federally compliant

The Challenge

As the organization scaled, leadership faced increasing complexity across HR, payroll, compliance, and performance management, including:

- Multi-state compliance risk and outdated employment documentation
- Misaligned worker classification and compensation structures
- Legacy payroll/HRIS systems that no longer fit the business
- Lack of standardized performance expectations and documentation
- Recruiting bottlenecks slowing growth

These challenges pulled leadership into day-to-day HR fires, limiting focus on revenue, strategy, and innovation.

Our Solutions

Pacific Crest Group provided ongoing HR & operations support, acting as an extension of the leadership team to stabilize systems, reduce risk, and build scalable people infrastructure.

The Results

- Reduced legal and compliance exposure across multiple states
- Lowered payroll and benefits costs with improved systems
- Clear performance expectations and documentation
- Faster, higher-quality hiring
- Scalable people infrastructure aligned with growth goals
- Leadership freed from HR firefighting to focus on revenue and strategy

See next page for details

CASE STUDY

HR & Operations Support for a Medical Services Company



Key Projects & Solutions

HR Compliance & Risk Mitigation

- Multi-state HR compliance audits and remediation
- Corrected worker classification (employee vs. contractor)
- Updated offer letters, handbooks, non-competes, and agreements
- Policy, compensation, and state-specific requirement reviews

Payroll, Benefits & HRIS Transition

- Led full transition from TriNet to Gusto (or other HRIS platforms)
- Built project plans, timelines, and internal communications
- Benchmarked benefits (health, dental, vision, WC, 401k, FSA/HSA)
- Trained employees and managers on new systems

Performance Management & Employee Relations

- Developed customized PIPs and coaching plans
- Supported sensitive employee situations (leave, ADA, conflict)
- Created documentation, scripts, and termination guidance
- Implemented KPIs and accountability frameworks

Organizational Structure & Compensation

- Standardized job descriptions and role clarity
- Built compensation philosophy, salary bands, and comp plans
- Designed sales commission structures
- Supported org chart changes and leadership transitions

Recruiting Infrastructure

- Implemented ATS platforms (JazzHR, Gusto, LinkedIn)
- Wrote job descriptions and interview workflows
- Built candidate scorecards and screening processes
- Supported strategic hiring across key roles

**Schedule a free consult with us
today at www.pcg-services.com**

☎ 415-461-2586

✉ info@pcg-services.com

🌐 www.pcg-services.com

📍 810 Fifth Ave., Suite 200,
San Rafael, CA 94901