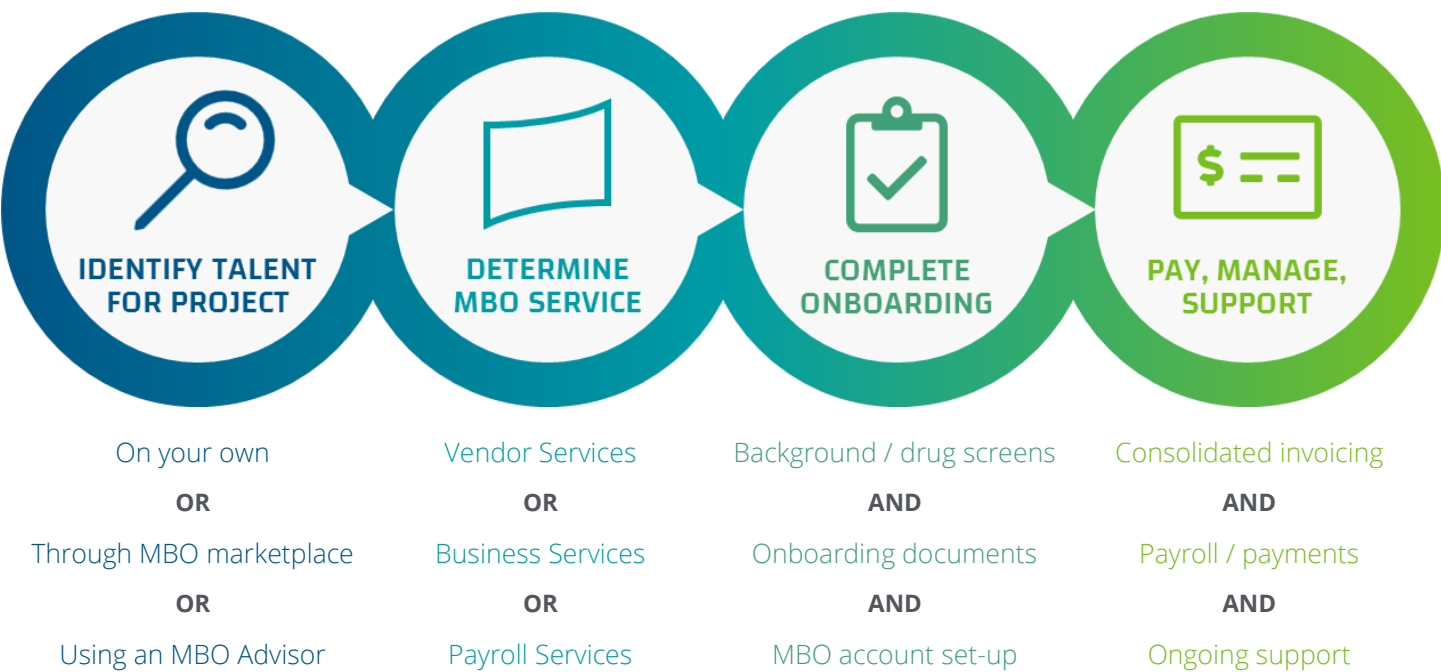


MBO Partners / Salesforce

Engagement Lifecycle Process Summary

MBO Partners, through our comprehensive independent workforce solution—MBO Access—supports Salesforce throughout an independent’s entire engagement lifecycle. This document explains the processes behind the four key areas of MBO Access: finding the right workers, determining the best way for them to engage, helping them complete their onboarding requirements, and handling all ongoing financial administration and support.



DAY 1	DAY 1 - 2	DAY 2 – 10*	ONGOING
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* Timing expectations are approximate. While MBO can fully onboard workers in as little as five days (to accommodate for the background screening), Salesforce recommends referring the worker to MBO 10 business days before the expected start date.

Note that onboarding timing strongly depends on the worker’s responsiveness. MBO provides clear instructions and works closely with each worker to improve responsiveness and accelerate the process as much as possible.

The sections that follow provide step-by-step explanations of each area of the engagement cycle.



COMPLETED BY
**SALESFORCE
MANAGERS**

TALENT SOURCING AND REFERRAL

► **Note:** MBO provides our engagement services for talent whom Salesforce managers identify internally and refer to us.

1. Source the right independent talent for your project directly (i.e., outside of the Salesforce staffing network/process). Examples of how to direct source talent include:
 - On your own, using talent you know and trust.
 - Using the MBO marketplace, through which clients create an easy-access community of proven independent talent.
 - Using MBO's Advisory Services, which provide a full-service independent workforce sourcing solution.
2. Refer the talent to MBO by completing this [Referral Form](#).

The day you refer the talent to MBO is considered **Day 1** of the engagement process summarized in the sections that follow.



COMPLETED BY
MBO

MBO ENGAGEMENT SERVICE DETERMINATION

► **Note:** Because no two independent workers are alike, MBO offers three services—**Vendor Services**, **Business Services**, and **Payroll Services**—to ensure an engagement experience ideally suited to each workers' unique characteristics.

1. MBO directs the talent to complete our proprietary online Engagement Questionnaire.
Timing: Day 1
2. MBO reviews the questionnaire responses and, if necessary, conducts a personal consultation with the talent to fill in gaps or clarify ambiguities.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)
3. Based on the above, MBO determines the engagement service that best fits the talent's experience, preferences, business structure, and vendor qualification status.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)



COMPLETED BY
**THE TALENT
YOU REFER**

ONBOARDING

► **Note:** MBO monitors each referral's progress in completing the onboarding steps and provides regular reminders to avoid delays.

1. MBO provides the talent a detailed list of onboarding steps that include Salesforce-specific tasks (immediately below). Candidates for Business Services or Vendor Services also complete qualification or business-related tasks (further below). In most cases, talent can complete both sets of tasks concurrently.
Timing: Immediately upon service determination
2. The talent launches a Salesforce-required background check.
Timing: Typically launched on Day 2 or 3 with results four to five days later
3. The talent reviews and/or completes appropriate Salesforce-required onboarding documents.
Timing: Typically Day 2 or 3
4. The talent completes a Federal I-9 form (W-2 engagements only).
Timing: Typically Day 2 or 3
5. The talent creates an account in the MBO system and signs the appropriate agreement with MBO.
Timing: Typically Day 2 or 3

Business-related tasks: Vendor Services

1. MBO instructs vendor candidates to send us business documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.).
Timing: Typically begins on Day 2 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. MBO evaluates the talent's business for vendor qualification, including business documentation review, insurance confirmation, and ensuring adherence to qualification criteria. Non-qualified talent engages through Business Services or Payroll Services.
Timing: Within one business day of receiving the business documentation

Business-related tasks: Business Services

1. If the talent already has a company, MBO requests and reviews supporting documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.). Non-qualified talent engages through Payroll Services.
Timing: Typically begins on Day 2 or 3 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. If the talent does not have a company, MBO assists with establishing a new compliant business. This may include filing the business with state agencies, securing a Federal EIN number, and more.
Timing: Typically begins on Day 2 or 3; business creation can take up to two weeks; can happen concurrently with remaining onboarding steps



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ONGOING PAYMENTS, MANAGEMENT, AND SUPPORT

1. MBO confirms completion of all onboarding activities and notifies you that the MBO onboarding process is complete. (Note: Salesforce may require the completion of additional non-MBO-related tasks before the project may begin.)
Timing: Within one business day of completion of the steps above
2. MBO provides the talent with detailed instructions for submitting hours, milestones, deliverables, and/or expenses.
Timing: Concurrent with step 1 above
3. MBO sends Salesforce an invoice that consolidates approved labor and expense submissions for everyone engaged through MBO.
Timing: Each Tuesday
4. As they work, MBO provides talent their labor payments and reimburses Salesforce-billable expenses.
Timing: Payment timing varies by engagement service. See the grid below.
5. For talent engaged through Vendor Services or Business Services, MBO monitors each business's adherence to appropriate eligibility requirements.
Timing: Ongoing throughout the entire engagement
6. MBO's experienced support professionals are standing by to answer talent's questions, resolve issues, notify talent of program changes or upcoming events, and provide guidance related to getting the most from their independent practices.
Timing: Ongoing throughout the entire engagement

PAYMENT TIMING EXPECTATION

Vendor Services or Business Services	After invoicing (step 3 above), Salesforce pays MBO based on Net 14 terms. We then pay talent in the next weekly payroll cycle. As such, talent in these services receive their payments three weeks after a given work week. See the Salesforce Payment Calendar for details.
Payroll Services	MBO pays talent engaged through Payroll Services on Fridays, two weeks after a given work week (or sooner if required by state law).