

# From skeptical to advocate: How Osaic found a payroll partner that understands their team

## The challenge

When Ivon Domingez joined Osaic as a Senior Payroll Manager, she brought 30 years of payroll expertise, and with that, extensive experience with big-box payroll providers that fell short. Her team had inherited OneSource Virtual (OSV) just six months before she arrived, and she'll admit she was skeptical at first.

"I came from pretty big companies in my career, and I had never really been introduced to OSV before," Ivon says. "I'd always been with the big-box companies, and I was never really quite content with the services they provided."

What concerned her most was the lack of direct support. With traditional vendors, getting help meant submitting a case and hoping for the best — never knowing who would handle it or when they'd respond. For a payroll operation supporting a growing wealth management firm, uncertainty was a problem.

## A partner that evolved with them

What Ivon discovered changed her entire perspective on payroll partnerships. Instead of faceless support queues, OSV provided dedicated specialists who worked directly inside Osaic's Workday tenant. The difference was immediate.

"I like having that dedicated person that I can reach out to and say, 'Hey, we're having an issue. Can you help me with this?'" Ivon explains. "Having somebody that I can connect with right away and not just send in a case and hope for the best — with somebody that knows what they're doing."



## Overview

# osaic

Osaic is one of the nation's largest wealth management firms, serving approximately 11,000 financial professionals and over 250 financial institutions, managing more than \$700 billion in assets. Osaic provides comprehensive support, resources, and solutions designed for the future of wealth management.



### Headquarters

Scottsdale, AZ



### Industry

Financial Services, Wealth Management



### Employees

2,500+



### OSV customer since

2017

As Osaic grew, so did their payroll team. What started as a team of one expanded to three people, and OSV scaled right alongside them. Osaic began with Managed Payroll services, where OSV handled the entire payroll lifecycle. As Ivon's team gained confidence and capacity, they transitioned to Payroll Premium, then to Payroll Administration — a model where OSV settles payroll and provides high-level maintenance while Osaic's team takes on more day-to-day tasks.

"It's helped my team grow because now it's their responsibility to do some of the action items that we used to get from a payroll premium perspective," Ivon says. "It's helped with the knowledge sharing and the technical support they needed."

The transition between service levels was anything but disruptive. "It was seamless to us," Ivon says. "It wasn't like, 'We cut you off.' It's kind of evolved to us being able to do more with their help."

## A relationship that feels like an extension of the team

Ask Ivon what sets OSV apart, and she doesn't talk about features or technology. She talks about people.

"I see them as our team members, too. They're kind of like the experts," she says. "I feel like they're part of our team, and that was the expectation — that it's not us against them. It's really about how we're collectively a team. Even though we're in different companies, we're still trying to get to that one goal, and that's to have a perfect payroll."

Her two team members, both of whom came from working with OSV's competitors, have noticed the difference too. "They like that we've built a relationship with your folks, to the point where it's not just professional, but also a personal friendship," Ivon says.

That relationship extends beyond pleasantries. OSV's practitioners have taken the time to understand how Osaic's team communicates. "They need to learn us, just like we need to learn them, because everybody does have a different way of communicating," Ivon notes. "It's learning the personalities, and that's what's been fantastic or fun about this whole experience."

## Decisions made together

When it came time to evaluate moving to a different service level, OSV didn't just present options and walk away. They engaged in genuine dialogue about what would work best for Osaic's evolving needs.

"I've been OSV's biggest advocate because I've been very happy about how they collaborate with me, how they're willing to negotiate," Ivon says. "'Hey, this might be better for you guys,' or 'You know what? I think you still need that support.' We're making decisions together, and that's the part that I like. It's really about the collaboration — that's why I'm such an advocate for OSV."



## Dependable, honest, and willing to go the extra mile

Recently, Osaic began exploring OSV's benefits administration services. Ivon's endorsement was immediate. "I was the first to say, 'Go with OSV,'" she explains. "It's just the experience I've had with OSV that's pushed me in that direction to help people decide, 'This is a company that we really should be investing in.'"

When asked what she'd tell a colleague considering OSV, Ivon keeps it simple: "They're just dependable. They're friendly. And they're willing to do what they need to do, to go that extra mile if the company needs it."

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- Ivon Domingez, Senior Payroll Manager at Osaic

## Time back for what matters

With OSV handling the complexity of payroll execution, Ivon's team has gained something invaluable: time to focus on the areas where they're still building expertise.

"By making it easy for us to do the payroll piece of it, it does give us that extra time to be able to focus on where we're not as knowledgeable," Ivon says. "The time back to be able to do more administrative and more specialized processes has been valuable."

For Ivon personally, the impact goes even deeper. "I personally want to say thank you to OSV," she reflects. "It's been a great experience, and it's made my life very, very pleasant. My work-life balance has been just fantastic. And that's because of the help of this relationship. It's been a good eight years, and I hope that we continue."