

Fix First, Blame Never: How PineBridge Found a Different Kind of Payroll Partner

The challenge

From audit failures to daily firefighting

After spinning off from AIG, PineBridge inherited what appeared to be a sensible choice: The lowest-cost payroll provider. But the cost savings quickly led to costly problems.

"We were failing audits. My day-to-day was really fixing things," says Jessica Noe, Global Head of HR Operations at PineBridge. On a biweekly basis, she found herself hunting down payroll errors, plugging compliance gaps, and basically running damage control instead of advancing her career or the organization's HR capabilities.

The situation reached a breaking point when audit findings revealed the company was at risk of IRS penalties. Leadership needed a solution, and fast.

But PineBridge's challenges extended beyond just fixing what was broken. The company's HR operations team brought creativity and agility to their work, but they didn't bring formal payroll training. "Our HR department is a bunch of people who are communications majors, English majors," Jessica explains. "I don't think anyone actually has an HR degree that sits on the operations team."

What they needed wasn't just a vendor. They needed a payroll department.



Overview



PineBridge Investments is a global asset management firm operating across multiple jurisdictions with complex payroll and tax requirements. Following their spin-off from American International Group (AIG), they partnered with OneSource Virtual (OSV) to transform their payroll operations from crisis management to strategic enablement.

 **Headquarters**
Dallas, TX

 **Industry**
Financial services

 **Employees**
750+

 **OSV customer since**
2014

A partnership built on trust, not blame

When PineBridge switched to OSV, they found something from the beginning: A partner focused on solving problems, not assigning blame.

"When I came into working in the payroll and HR ops space, the first few issues we had, prior to coming to [OSV], I felt like it was almost 'let's discuss whose fault the problems were and then let's fix it,'" Jessica recalls. "That was truly frustrating."

With OSV, the mentality shifted. "We would fix the problem first," she explains. "The problem gets fixed, the employee gets helped, and then we will sort out what it was. We will talk about how we will try not to have it happen again, and then we move on."

That fundamental shift in approach built the foundation for everything that followed. "That was what really built my trust and what still has me sitting here 11 years later," Jessica says.

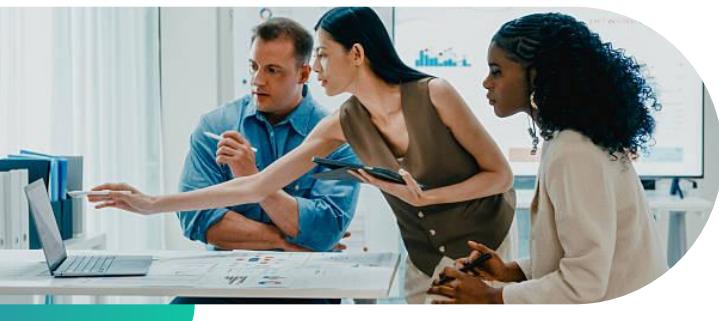
Expertise that fills the gaps

PineBridge's operations present the kind of complexity that demands specialized knowledge: EINs, multiple tax jurisdictions, and a mobile workforce where salespeople frequently relocate across state lines.

"With us, growth often means change," Jessica notes. "We have salespeople, and they're moving into different locations, and I consistently need to know about the tax pieces pretty quickly. Because it's often 'Hey, I moved,' not 'I'm going to move.'"

This is where OSV's dedicated Workday expertise makes a tangible difference. "[OSV] is our payroll department," Jessica says plainly. "We do not have anyone who is classically trained in payroll."

OSV's team proactively monitors changes in tax regulations, manages the complexities of multi-state compliance, and helps PineBridge navigate retroactive employee moves. "[OSV] often needs to help me figure out how to either backdate this or do we need to just have them tell us they moved in a few months," Jessica explains. "What the impacts are, and work with them in pretty short order."



Keeping pace with Workday

Beyond payroll, OSV helps PineBridge stay current with Workday's rapid evolution. "Workday is growing at paces I can't keep up with," Jessica admits. "We are an HR team that is small, and sometimes Workday has more emails a day than I can keep up with."

OSV monitors Workday updates and flags what matters. "They keep an eye on it for me on the payroll side," Jessica says. "They will keep up to date with all those pieces. They'll tell me where we need to do some updates."

The impact: beyond a simple fix

The partnership with OSV delivered results that extended far beyond fixing payroll errors.

→ Compliance restored:

OSV went back and cleaned up existing tax issues, then discovered problems PineBridge didn't even know existed. "They went back and fixed a lot of the tax issues we had. They found some things we didn't even know were going wrong," Jessica notes. The company identified tax efficiencies and established proper processes across their complex, multi-jurisdictional structure.

→ Career transformation:

Freed from constant firefighting, Jessica was able to advance professionally. "It allowed me to move up and build a team," she says. Eventually, she took on the role of Head of Americas in addition to her HR operations responsibilities, expanding the organization's talent capabilities. "It's given me a great depth to my role, and I've got to do a lot of stuff and exercise the other side of my brain."

→ Strategic focus:

With OSV handling the transactional work, PineBridge's HR team shifted their focus entirely. "[OSV] takes care of all the dirty work," Jessica explains. "I can keep my focus on whatever we're working at, at a higher level."

The team no longer stops work to chase down answers or research tax implications. "We have very high-touch clients, and when they come through to us with questions, they need quick answers," Jessica says. I don't have to answer it anymore. I know that [OSV] will take care of it."

→ Team growth and development

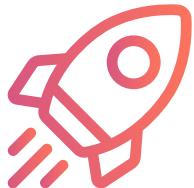
OSV's support allowed PineBridge to build out their HR capabilities systemically. Jessica was able to develop her team and delegate the day-to-day payroll operations entirely. "I don't really deal with the day-to-day payroll things anymore, at all," she says.

→ Enhanced Workday utilization:

With time to think strategically, the team could expand its use of Workday beyond the basics. "Eventually, as I moved up, it just became not that much of my life," Jessica explains. "We were able to further expand what we're doing with Workday because I had time to actually think about it and be like, 'Okay, well, we have the basics down. What else can we be doing?'"

"[OSV] takes care of all the dirty work," Jessica explains. "I can keep my focus on whatever we're working at, at a higher level."

-Jessica Noe, Global Head of HR Operations at PineBridge



Going above and beyond

OSV's specialized Workday knowledge proved invaluable early in PineBridge's relationship when Jessica was still relatively junior in her role. When her COO questioned their Workday selection, OSV's team stepped in to help guide her through vendor selection and implementation decisions.

"It was really helpful to talk with a company that had only used them," Jessica recalls. "You have some really good CSMs and some senior folks who were willing to talk to me and help guide me in some other directions because I honestly didn't know what I was doing in certain areas."



The long-term difference

After 11 years of partnership, PineBridge has developed the kind of trust that only comes from consistent delivery and genuine care.

"It took a while for me to believe it, if I'm honest," Jessica admits. "The first few years were a lot of me still doing what I was doing beforehand, which is just rechecking their work. But they really were what they sold."

Today, that trust translates into complete confidence. PineBridge's HR operations have grown from a team focused on fixing errors to one driving strategic initiatives across the organization. The team added talent management capabilities, enhanced their benefits offerings, and built an HR department that supports business growth rather than maintaining operations.

"It has just been game-changing, honestly, for myself and then what has become my team," Jessica reflects. "[OSV] has the expertise that we just don't own on staff, and they keep us in check everywhere that we need to be. We don't have those problems anymore."

[OSV] has been more of a partner. I kind of consider them my payroll department," Jessica says. And for a lean HR team managing complex operations, that partnership makes a difference.