



CUSTOMER STORY

**Coda Search streamlines payroll and HR processes, brings it in-house with the Greenshades Payroll & HR Platform, accelerating continued growth and expansion.**

**Overview**

Founded in 2011, Coda Search (Coda) is an executive search firm specializing in identifying and placing candidates at all levels. While headquartered in New York City, Coda recruits and places candidates in every state. At the beginning of 2022, the business operated in California, New Jersey, New York, and Pennsylvania. By spring 2022, Coda experienced rapid growth by expanding into Florida, Colorado, Connecticut, North Carolina, and Tennessee.

**Challenges**

Coda faced major challenges before working with Greenshades, including a lack of visibility and a cumbersome, time-consuming process that made it harder for management and staff to focus on their more strategic functions.

- Originally, Coda had been outsourcing their payroll. Coda had limited access to payroll data and little visibility of the processes. While outsourcing allowed Coda to grow, they realized that the processes could be better and needed to be sustainable for the future.
- Employees did not have direct access to their paystubs, meaning they had to request them directly from management. This delayed employees' visibility of their pay while also taking the executive team away from more strategic functions.
- Coda has offices in multiple states, so the lack of visibility made it hard to understand the different tax codes and withholdings for each location.
- Coda's HR documents were filed and stored manually, making onboarding difficult and time-consuming.



## Solutions

Coda implemented the Greenshades Payroll & HR Platform Plus, which includes payroll services, the complete HR and onboarding system, employee self-service, and the tax center. Implementation began mid to late February and was up and running by April 1. Implementation was rather quick despite undertaking an entirely new ERP solution with Acumatica, in conjunction with Greenshades.



## Results

- Coda now has improved visibility and better control of its payroll processes. In addition Greenshades integrates with their new ERP system, Acumatica, streamlining overall operations.
- Coda employees have easy access to an HR portal in Greenshades, giving them direct visibility to their paystubs, 401(k), benefits, and other HR documents.
- The Greenshades platform serves as the 'one-stop shop' for all HR-related things, from onboarding documents to company handbooks. With built-in notifications, automatic distribution of forms, and easy approval, the platform has streamlined the tasks involved for the limited HR staff.
- Optimizing processes like payroll, and bringing them in-house, has prepared Coda for continued growth and expansion. Time previously spent on manual payroll and HR tasks are now spent on more strategic functions- allowing management to focus on the bigger picture.
- Greenshades' approach to multi-state calculations eliminates manual processes and increases accuracy and compliance for Coda, which operates in multiple states and tax jurisdictions.

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Greenshades' support staff is always accessible; you don't have to jump through hoops to speak with a live person as you do with larger payroll providers. Greenshades has never made us feel like a case number- personal connections and communication mean everything.

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- **Leon Persaud**  
Controller