



# Boost Engagement and Team Efficiency With the Right Equity Compensation Provider





## When it comes to equity compensation plan providers, it's crucial to select one with the right technology, resources and expertise.

A provider should offer solutions that meet your company's unique compensation program needs, reduce costs and enable your human resources (HR) and finance teams to work more efficiently and effectively.

To achieve this, it's important to also consider the return on investment (ROI) of your equity compensation program. A well-chosen provider with the right technology can streamline operations, automate processes and save time—ultimately boosting your teams' efficiency. However, transitioning to a new system also requires careful planning to ensure a smooth implementation.

The time needed to seamlessly migrate data and retrain staff on a new system should be taken into consideration to avoid disruptions. Ensuring a well-structured process with clear timelines for data migration and staff retraining will not only minimize complications, but also help your teams quickly adapt so that the benefits of the new solution can be realized.

EQ's EquiTrax™ platform was designed to enhance the management of equity plans, increase operational efficiencies and elevate the user experience. To illustrate how the EquiTrax experience impacts client companies and participants, we've compiled this list of commonly asked questions about employee equity compensation plan solutions.

# 01. How does a plan's participant platform influence employee engagement and satisfaction?



Ease-of-use is a key factor for any technology and this can vary widely from one vendor to the next. It is important to have a flexible solution that reflects your employee equity compensation program needs and your company branding. Another important factor is the quality of support for your participants.

One sign of this kind of flexibility is the inclusion of technical specialists in the sales process. When solution providers begin by listening to client needs early on, it generally means the proposed solution will be based on client priorities. Asking questions about how your program will be brought to life at this stage can help prevent frustration later on.

Flexibility to make adjustments after implementation is important, too. If needs change six months later and require an update in the portal, how complicated is that process going to be? Tactically, look for an intuitive 24/7 dashboard with multilingual and multi-currency functionality that enables participants to:

- Access a detailed history of activity and time-sensitive communications
- View, model or transact on their holdings
- Model to estimate cost, taxes and net proceeds
- Review equity plan-related tasks
- See a consolidated view of all their plan shares
- Access training and educational tools
- Sell and transfer holdings without the need for an individual brokerage account
- Reach out to a full-service call center staffed by solution employees

## 02. Why is the flexibility to customize the platform experience important?

A key consideration when choosing among equity compensation providers is whether the provider's platform enhances the participant experience. Choose a provider that can easily reflect your company's culture and branding. Having a branded platform can improve the participant experience as it offers a more personalized and seamless experience.

Another example is if a company uses a brokerage firm as its equity plan administrator, chances are

participants are using a platform dominated by the brokerage firm's branding, which can translate into a "one-size-fits-all" experience. By contrast, EquiTrax is a broker-agnostic platform, enabling client companies to use the brokers of their choice.

Flexibility is a defining feature of EquiTrax, an integrated employee equity plan solution designed to suit each client's business, culture and employee equity compensation needs.



### **Flexible, collaborative relationships for success**

Building long-term relationships through a consultative approach with our clients is key to everything we do at EQ. Unlike many other providers, we do not allow broker solicitation of executives and participants, which our client companies appreciate.

# 03. How does EquiTrax make things easier for finance and HR teams?





EQ provides full-service administrative support for all your employee equity compensation program needs. We have a one-to-one approach for service, with each customer success team consisting of a dedicated relationship manager, a client service manager and a back-up client service manager. In addition, our teams can call on specialists, such as EQ experts in employee equity compensation, executive services and financial reporting to provide comprehensive support.

EquiTrax's reporting tools are readily accessible for tax calculations, long-held share balance, participant demographics, grant recap, grant detail, transactions, disposition detail and enrollment statistics. EquiTrax and our client success teams are just two of the many ways we help clients foster employee engagement and a culture of ownership that makes employees feel valued. Our experienced team takes a consultative approach with every client, working to help you build employee equity plan solutions that meet your needs and then seamlessly deliver your plan.

With expertise in ownership, the EQ team works with you to build employee equity plan solutions that fit your budget and reflect your employee engagement objectives so that they can deliver your plan with seamless execution. When you choose to use a single provider for transfer agent and equity plan administration services, processes are more streamlined and can result in time and cost savings. EQ's experienced transfer agent teams put the satisfaction of issuers and shareholders first. For over 40 years, our commitment to supporting ownership has guided our products and processes, whether as transfer agent, equity plan administrator or both. **[Read more about why a transfer agent is a better choice for your equity compensation services needs.](#)**

## Multiple plan administrators? Consolidation can save time and money

Doing more with less makes sense when you have a trusted partner. Working with a single service provider like EQ can:

-  **Reduce operational risk**
-  **Create efficiencies**
-  **Eliminate the need for multiple reconciliations**
-  **Simplify the employee experience with one portal and login for communications, enrollment and more**



## 04. What is the implementation and training process for EquiTrax like?

EQ provides a streamlined and efficient onboarding experience. Implementation managers lead clients throughout the process, starting with documentation of the client company and everything that is relevant to their needs. The implementation team provides relevant and helpful user guides with information including the types of plans they have, their rules, user demographics and more.

This is a crucial step in the EQ method because it sets us up to act as a longer-term advisor to our client rather than owner of the transactional corner of their equity plans. We aren't just implementing the EquiTrax platform, we're also laying the foundation for a consultative relationship—another difference between us and our competitors.

As they are building the client profile, the implementation team is also setting up the EquiTrax platform as part of the solution. The process takes about 12 to 14 weeks and includes the typical checks and guardrails that are part of systems implementations. After implementation, the client success manager takes on the day-to-day responsibility of making sure everything is running smoothly for the client company and all participants.

Training on the platform takes place throughout the implementation, but there is also a wide array of resources for education and training available at any time, including tools and a fully serviced help center.

# EquiTrax puts your people at the center of your equity plan

Think about EQ as a consultative equity plan solution provider—one that is focused on your company and employees' success with services delivered through a platform that meets your unique needs.

Contact EQ today to discover how EquiTrax can boost employee satisfaction and retention, and provide your company with expert support.



## **ABOUT EQ**

EQ are specialists in helping you better understand and manage the ownership of your company through critical events across the corporate lifecycle. As trusted advisors, we provide strategic insight and operations expertise through our core business units in Private Company Services, Transfer Agent Services, Employee Plan Solutions and Proxy Services. Globally we serve 6,700 clients (49% of the FTSE 100 UK and 35% of the S&P 500), with over 40 million shareholders, through 6,500 employees in 5 markets around the world.

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