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HR tech success: Your guide to selecting and implementing the right platform

A look at key HR features, how to build a business case, implementation challenges, and more.

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HR teams have more responsibilities than ever – from enabling hybrid work models, to updating recruiting strategies, to supporting employee mental health in increasingly challenging times – you name it.

The right HR applications – or combo of them – can help teams deal with these growing challenges. But with all the options on the market, how can you ensure you're choosing the best one?

Read on in this expert guide to learn:

- **The key HR features to look for**
- **Common implementation challenges**
- **7 tips for successful change management**
- **And much more**

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5 tips for choosing the right HR technology

Eric St-Jean, SearchHRSoftware

The HR software market has many applications available to organizations looking to automate manual HR processes or replace their current HR applications. With so many options at your disposal, it might be reasonable to expect that the perfect HR application exists; however, there is no silver bullet.

That's not to say that there aren't great HR applications, but they all typically have limitations in one area or another. And understanding that no panacea exists can help you better advocate for and choose the right HR technology -- the one that will be best for your organization.

As an HR leader, it is essential to have and set realistic expectations as you begin the process of selecting and implementing a new HR system. While you want to put a positive spin on the benefits a new HR application will bring to your organization, setting expectations too high may lead to disappointment. To reduce the risk of overpromising and underdelivering, consider the following points as you embark on your search for a new HR

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application to ensure employees have the best experience possible post-implementation.

1. Clearly document your requirements

The best way to validate that an application will meet your needs is to have clearly defined requirements. The more detailed and specific these are, the better you can evaluate each vendor's HR application and determine where it can meet your requirements and where it can't. Then, as you read about the different HR applications, watch demos and speak to others, rank each vendor's ability to meet your requirements based on your knowledge at the time.

Prioritize your requirements

Assigning an importance level to each requirement will help you focus on the most critical needs first. Not only will this help you stay focused, but you can also use the list to keep the vendors focused on what's most important to you.

For example, suppose a multilingual system is critical for your organization. In this case, you will want to ensure the HR application supports the languages you require early in the sales cycle, both from a user interface and help system perspective. You may also want to confirm how your system administrator can maintain custom forms and picklists in multiple languages to verify that they are possible and not overly cumbersome.

2. Research HR vendors

There is an endless amount of information available online about HR applications. Go through the vendor's website and the vendor's competitors' websites, then read blogs and opinion pieces from qualified professionals. This research can help you validate your requirements, introduce you to new vendors, and help you understand what is possible and what might be difficult to achieve.

3. Arrange demos

The first demo may be high-level, short and with a small number of people. The first demo will help you get an initial understanding of the vendor and their HR application. As you progress in the sales process, you should ask for one or more detailed demos to validate the application against your requirements. Provide a list of your most critical features to the vendor ahead of a demo. This will help them determine if and how the application can meet your needs. It will also give them the information they need to configure the demo site correctly. Also, include stakeholders in your demos who you believe will provide honest and insightful feedback.

Understand that large vendors aren't always better

While a more prominent vendor will often provide more features in their HR application, their system will almost certainly have limitations. In addition to the limitations, you may run into other challenges that don't come up with a smaller vendor, such as the increased complexity of implementing and maintaining a HR technology meant for large multinational organizations. Start your search broadly and include vendors of all sizes before narrowing down your list of vendors to the top two or three who are most aligned with your requirements and company values.

4. Take a buffet approach

Your preferred vendor may have a very good HR application with the exception of one or two modules, such as recruiting or performance management. Rather than dismissing the vendor altogether, consider building a solution from multiple vendors that, when combined, meets your requirements. While interacting and integrating software from multiple vendors can introduce some complexities, the end result may provide a more robust HR system that meets your employees' expectations.

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Request references

Ask your preferred vendors for references before making a final decision. Ideally, the reference organizations will be similar to your organization in terms of size, country and industry. Be prepared with a list of questions to guarantee you get answers to your most important ones. For example, ask about limitations in the software, how many of their enhancement requests were implemented, and what they like and don't like about the HR application.

Speak to your professional network

You don't have to go it alone when choosing the right HR technology. There are professional HR associations in many cities and national organizations in several countries. Reach out to them and the HR professionals you know. Find out which applications they are using, what they like about them and what they wish they did better. If possible, try to find another organization that uses the software you are considering licensing. Many people are pleased to share their experience and provide honest feedback about what you can expect from the vendors they've worked with.

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5. Prioritize communication

When sharing information about the new HR application, ensure you don't make promises that can't be achieved. For example, employees should understand what exactly will happen at the go-live. It may be better to communicate at a high level until you know for certain how a feature will work for your organization. When you identify limitations, communicate how the system will work and the mitigating actions you are taking to reduce the effect on employees.

As part of your communication plans, be sure to factor in how the implementation approach will affect promised features. While a phased implementation can reduce the risk of a large project, it does leave features on hold until the next phase. Therefore, you'll want to make sure expectations are set appropriately when discussing the HR application's benefits with employees. If you don't plan to implement a feature until phase two or three, you will want to avoid emphasizing it in phase one.

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15 must-have HR software features and system requirements

Eric St-Jean

Tracking employee data within your company is a key task for the HR team and best managed with HR software. Before starting the process of evaluating HR systems, it's important to build a list of requirements and understand the different software features and modules available to address them.

When determining the features to include in the requirements document, your company's culture is important. If the organization fosters a learning culture, for example, a learning management system (LMS) may be more essential than performance management software. Consider the following HR software features when compiling an HR system requirements checklist.

1. Cloud-based vs. on-premises

Most HR systems are cloud-based. The software is hosted by the vendor, and corporate access to the application and data is available through a web browser or mobile device. Alternatively, vendors offer HR software that's

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installed and managed on premises within the enterprise, typically by IT. Both options have advantages, but cloud-based is the preferred model.

2. Core HR

A key component of HR software, the core HR module stores information about employees and is often the hub for functionality that's applicable to the whole HR system, such as security and reporting. When evaluating the core HR functionality, validate the following points:

- one centralized database rather than multiple databases, which can happen when the software is built through acquisitions;
- all the necessary employee information can be entered, such as employee name, address, emergency contacts, salary, job and department;
- ability to create custom fields to track information specific to the organization;
- role-based security, which simplifies the assignment of access rights to employees;
- future-dated and back-dated changes are entered;
- system is configured to meet all government compliance requirements and the required data extracted; and
- non-employee data, such as contractor information, can be entered.

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3. Time and attendance

HR software typically provides features to track absences and capture working hours on a timesheet. Ensure that the system can accommodate corporate policies and practices. Validate that the system can do the following:

- provide the ability to configure all the absence types used by the company;
- define which absence types apply to which employee populations;
- produce schedules and timesheets that display and capture required information;
- make timekeeping simple for employees using a mobile device or browser;
- provide exception reporting to highlight missed shifts, missed clock-outs and overtime;
- specify statutory holidays by country and region and configure eligibility requirements; and
- provide approval workflows and reminders for absence requests and completed timesheets.

4. Recruiting

Often referred to as an applicant tracking system, the recruiting module covers the lifecycle of finding and hiring new employees. Most HR systems include this functionality, though it's not always as advanced as the systems from vendors who specialize in this area. Key HR software features to consider include the following:

- job library that contains a job description and key information about the job, such as salary, job family, job level and salary range;
- configurable requisition and offer-approval workflow;
- easy process to post open positions to multiple sites and job boards;
- reports, tags and custom groups to track candidates;
- support for multiple offer templates to meet the unique needs of the company;
- support for the entire offer process, including sending offers, candidate signature and returning a signed offer electronically;
- support for advanced digital signatures like those offered through DocuSign;
- ability to add attachments to offers; and
- easy-to-send regular communications to passive candidates.

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Build a business case for an HR system

GATHER HR REQUIREMENTS Get employee feedback about HR processes and systems and measure their efficiency.

ASSESS YOUR CURRENT SYSTEM Analyze whether it can still meet your needs or new software is needed to address its shortcomings.

START BUILDING THE CASE Draw on the collected data and requirements. If your organization requires a template, use it.

IDENTIFY AND QUANTIFY BENEFITS Estimate the time, labor and cost savings from improvements like reduced data entry or faster approvals and reporting.

FOCUS ON ROI Prepare a solid quantitative analysis and be ready to defend it.

KNOW YOUR AUDIENCE Identify the unique needs of executives, finance, legal, HR and other key groups to build support and counter opposition.

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5. Onboarding

An onboarding module can enhance the onboarding process for new hires and provide a positive first impression. At a minimum, new hires use the onboarding module to complete forms and review policies. Consider the following features when developing an HR system requirements checklist:

- simple process to move new hires from recruiting to onboarding and avoid rekeying data;
- customized landing page that includes adding company information, videos and organizational charts;
- employees able to complete and sign forms and policies;
- before their first day, new hires able to access and complete all the necessary paperwork; and
- task lists for everyone involved in the onboarding process.

6. Performance management

Many vendors have added features to support informal feedback options, while continuing to provide functionality for a traditional performance review management process. Regardless of the performance management approach, consider the following points when evaluating HR software features:

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- configurable form to capture required data from employees and managers;
- configurable workflows so the process and approvals align with the company's process;
- concurrent filling of forms, which reduces the amount of ping-ponging required to complete the review process;
- reports and dashboards to track progress and analyze results;
- 360-degree feedback; and
- integration with compensation and succession.

7. Employee benefits

Incorporating a feature that captures employee benefits information can save significant time during the onboarding process and open enrollment. Based on company requirements, confirm that these capabilities can do the following:

- configure multiple plan options;
- upload data to insurance providers rather than rekeying the data;
- when applicable, allow employees to choose their coverage based on the options presented and provide costing; and
- push data to payroll to avoid rekeying data.

8. Reporting and dashboards

While reviewing HR software features, allocate sufficient time for reporting and dashboards. Too often, those capabilities are left until the end of a demo. Consider the following:

- enough standard reports available to meet most needs;
- dashboards that include charts and graphs to provide actionable insights;
- ability to create custom reports and dashboards without too much complexity;
- scheduling reports and dashboards emailed to specific employees on a regular basis; and
- restricted access to data using role-based permissions.

9. Learning and development

Incorporating an LMS and learning experience platform (LXP) can streamline the administrative tasks of scheduling and running courses, provide online courses and reinforce a corporate learning culture. Consider the following features when exploring an LMS and LXP:

- support for online and instructor-led training;
- ability to combine courses, articles and videos into a curriculum;

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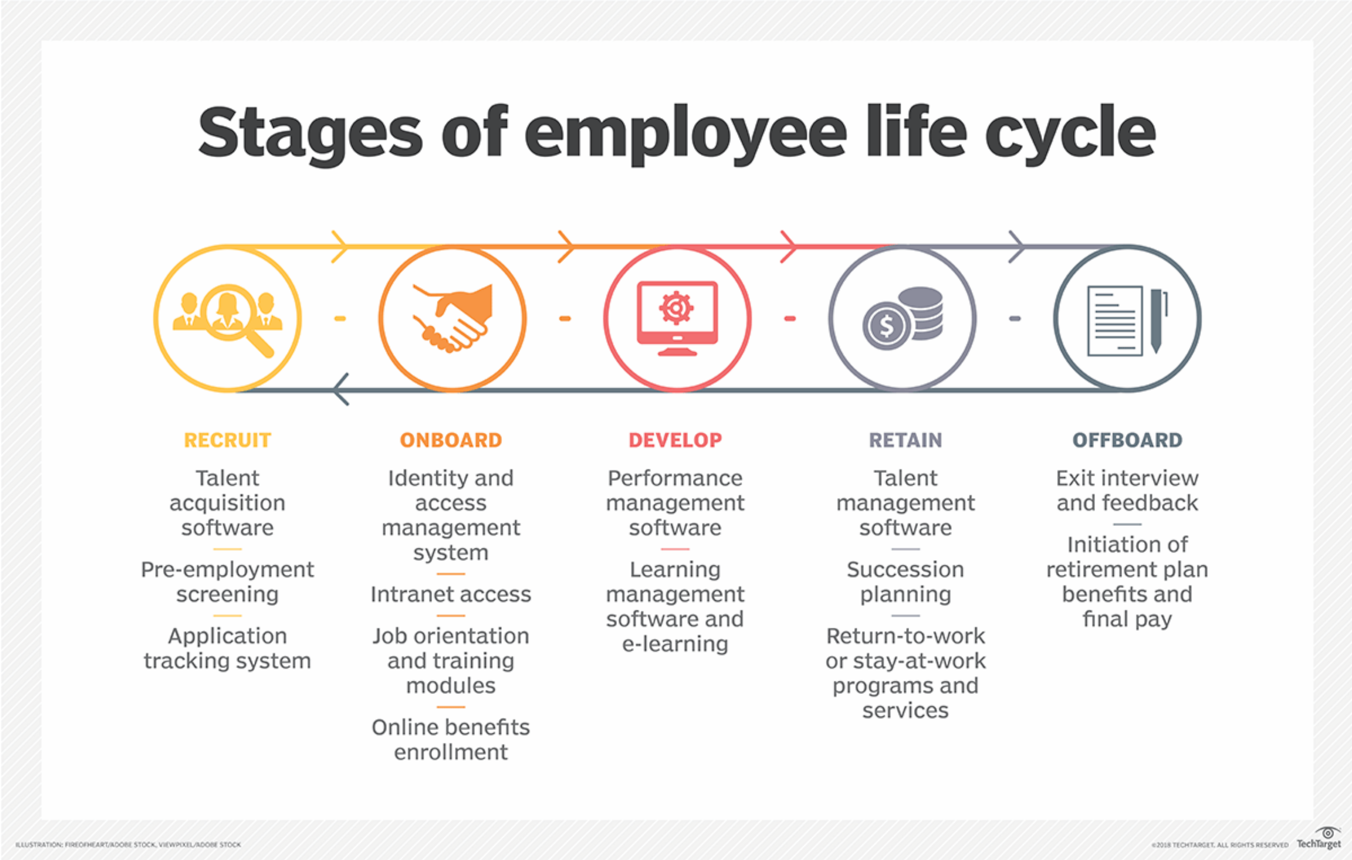

- integration with third parties that license online courses;
- detailed reporting and dashboards; and
- auto-assign courses based on predefined rules.

10. Self-service portals

A significant benefit of using HR software is the ability to securely share information with employees and managers. Consider the following self-service features:

- employee self-service that allows employees to view and update personal information;
- manager self-service to view and update direct report information;
- role-based permissions to control access to sensitive data; and
- approval process that ensures all employee- and manager-initiated changes are acceptable.

11. Integration options

The ability to integrate the HR system with other software used within the enterprise can be very valuable. IT systems, for example, might benefit from knowing about new hires and terminations. These two options are typically available:

- custom integrations, which allow data to be pulled programmatically from the HR software; and
- partner integrations, which offer prebuilt integration with specific third-party applications.

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12. Data management

Data can be edited and audited with HR software's built-in tools. The following HR software features may be available:

- data import when multiple changes are required at once;
- quick entry to list multiple employees and a subset of fields requiring an update; and
- error checking to ensure data is cleanly entered and valid.

13. Payroll

The data between HR and the payroll department is closely tied and warrants consideration, regardless of whether payroll reports to HR or finance. Many HR systems offer a payroll module in addition to prebuilt integrations with the major payroll providers. Consider the following payroll features:

- tight integration with core HR to avoid rekeying data;
- support for multiple currencies;
- enough payroll codes to meet current and future needs;
- employee access to pay statements and other tax-related forms;
- integration with the time and attendance module and benefits module;

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- simple data validation tools to ensure data is correct before being submitted; and
- payroll comparison to highlight significant changes from one pay cycle to the next.

14. Succession planning

Adding a succession planning module to an HR system can help identify and prepare rising stars within the company for senior roles. But since time and cost are involved to implement and license this module, be sure there's a companywide commitment to succession planning. Consider the following capabilities when evaluating a succession planning feature:

- integration with performance management and core HR;
- easier to use than spreadsheets and emails; and
- ability to incorporate job data, such as job grades, job families and job descriptions.

15. Compensation

Although just a once or twice a year process, compensation planning is critical to get right, and the often-used spreadsheet can be problematic. A compensation module can provide the following benefits:

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- eligibility rules to determine which employees will be part of the compensation process;
- budgets that can restrict managers from overspending;
- workflows and approval processes;
- data security and control to protect sensitive data;
- comprehensive reporting to understand who will receive a pay increase and how budgets are being spent; and
- performance management ratings that default to a recommended salary increase.

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How to build an HR software business case

Eric St-Jean

Building a solid business case for a major technology purchase is critical to running HR strategically. That means mastering the ins and outs of the process.

As an HR leader, you need to understand what the technology buying committee is looking for. The committee may include IT, leaders of different departments and possibly the CEO, depending on the size of the company. They look for a return on investment (ROI), how the HR technology will fit with other planned applications and the benefits of the new HR system, just to name a few factors.

Here's how to build and present a solid business case so those needs are addressed.

1. Gather HR requirements

Start by identifying and calculating HR system needs. This involves clearly documenting the issues your team is facing and how you can best address them. To complete this list, speak to key stakeholders, such as employees, managers and job candidates. Some of the issues may be subjective, such as an employee experience that people say is nonintuitive or difficult to use. Others will be quantitative, for example, the 30 minutes it takes to process a candidate's application. With quantitative feedback, you can assess the annual cost, calculate the ROI and look for cost savings.

You can also include past projects you haven't been able to complete. For example, if the business asked you to automate a change request form for newly promoted employees and your team didn't have the right software for the task, note it in the requirements portion of the business case.

2. Assess your current HR system

Once you have a complete list of your needs, you should do a deep analysis of your current HR system and related applications. You may find functionality you did not know existed that will allow you to meet some of your needs. Cloud-based software changes often, so it's important to ensure the functionality your team requires isn't included in a recent release. The assessment should be an honest look at what may or may not be possible with your current HR systems.

Assuming your existing software can't meet your needs, you should consider the additional, related functionality a new system could provide. Projects may be planned for the next few years that could benefit from a new application, improving the overall ROI. Make sure to include these milestones in your final business case template. Licensing new software may also help you get lower-priority functionality more quickly.

3. Use business needs to build the business case

With all the information you've accumulated, you are now in a good position to build a business case for review. Use the needs you identified and your organization's business strategy to build the business case and to explain any other system options you've considered. The business case will also provide the data you collected as justification for your project.

If possible, start with the business case template that your company uses for all requests. This will ensure you provide all the information the purchasing committee requires. It also makes it simpler for the key stakeholders, since they will be accustomed to the format and can easily locate the details they are most interested in.

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4. Identify and calculate the benefits of a new HR system

There is no magic formula for calculating the benefits of a new HR system, but there are a few things to consider and adapt for your specific work environment. No two organizations are the same, and few are starting from the same point. For example, one organization may already have an HR system it wants to replace, whereas another is considering implementing its first HR system.

Here are some factors to consider when determining the benefits of a new HR system.

Less rekeying of data. One of the tangible benefits that is often sought from a new HR system is eliminating the need to enter data more than once. Often, HR teams must enter employee information in more than one system, such as core HR, a learning management system and performance management software. There may be other teams in the organization that also must rekey data, such as payroll and IT. Eliminating these administrative tasks saves time with every change in an employee's lifecycle, from onboarding the new hire to employment changes (such as a new manager) and termination.

To calculate the savings from a new HR system, you need the following information:

- the amount of time needed to enter employee information into each system;
- an estimate of the number of employee changes captured per year, such as the number of new hires, terminations and employment changes; and
- an understanding of which systems will be replaced by the new HR system. For example, it might not be possible to eliminate all rekeying during the initial implementation.

With that information, you can do a simple calculation: average time required to capture and update information multiplied by the number of systems.

Enhanced HR reporting. Generating comprehensive reports from multiple HR systems can be problematic and time-consuming. Often, reports are run in each HR system and then merged in a spreadsheet. Not only do you end up with a static data set, the chance of human error increases by the number of manual processes involved. To calculate the benefit of using an HR system that produces comprehensive reports, you should consider the following points:

- how long it takes to generate each report that is required on a regular basis;

- the time required to generate ad hoc reports; This is important because there will always be a need for ad hoc reports; and
- the cost of using static and error-prone reports, which is the hardest to put a value on. For example, someone might build a turnover report that the company will use to develop retention and talent acquisition programs, only to find out later that the report had errors.

To calculate the benefit of improved reporting, you may want to focus on the first two points above. Start by listing each report, the frequency and the amount of time to build each one. You can then multiply those figures to get an approximate savings from a system that eliminates the need for manual intervention to build reports.

Streamlined HR processes. A typical goal of buying a new HR system is to streamline manual processes, eliminate unnecessary steps and provide better tracking. To that end, new HR systems typically offer features that allow you to automate workflows and provide notifications.

Workflows automate the passing of information from one person to the next, and are often used for approvals, such as for salary increases. You might be able to configure the workflows to automatically escalate the approval to the next-level manager when the approver takes too long. This ensures that current HR processes remain efficient and can continue without the need for manual follow-up.

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Notifications provide regular reminders to employees who have not completed assigned tasks. They eliminate the need for someone to track the tasks manually.

To calculate the benefit, you need to estimate the time spent per week to follow up with employees on outstanding tasks. You will likely want to assume that some manual follow-up will still be required, since some tasks are time sensitive and require quick turnaround. In that case, you may want to say that 80% of the time the system alone will be sufficient and 20% of the time a manual reminder will be needed. You can multiply the average time it takes per week to follow up on outstanding tasks by the percentage of time you expect to save, such as 80%, then multiply that result by 52 weeks to get the savings per year.

Improved employee experience. One benefit of a new HR system is a better employee experience that comes from letting employees go into the system more frequently to update personal information and look up the information they need without involving HR. To calculate the time employees spend in your HR system, consider hosting study groups and have participants perform common tasks to determine an average amount of time per task. You can multiply the time for each task by the approximate number of times per year employees perform each task, then multiply by the number of employees. To complete the calculation, you may want to set a target for the savings to be earned from the new HR system, such as a 50% reduction

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in time. Regardless of the HR system chosen, employees will still be required to update and look up information in the HR system, so you won't get a 100% savings.

Simplified system administration. While many organizations already dedicate a limited number of employees to maintaining their HR systems, simplifying the configuration and maintenance of the system benefits everyone. When multiple HR systems are used, the HR system administrator will spend time updating and configuring each one independently. With one HR system, the administrator will have more time to fix issues and incorporate enhancements that benefit the whole organization.

To calculate this benefit, your HR system administrator will have to track the amount of time they spend maintaining each system independently and then estimate the savings from having one system. For example, security role changes might currently have to be made in multiple systems but only one if a new HR system is implemented.

5. Focus on ROI

Once you are in front of the committee, be prepared to answer questions about your projected costs, savings and ROI. Implementing a new HR system is a major commitment in terms of implementation costs, ongoing licensing costs, employee training and related costs and time associated

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with introducing a new system, so it's important to ensure you justify the business need.

The committee will expect that you have sufficiently researched and validated the information. If you can't defend your quantitative analysis, the key stakeholders will most likely reject your business case and it may take a long time to get a revised one considered. If you miss the budget cycle, you may have to wait for the next one, which could be the following year.

6. Know your audience

In addition to understanding the requirements, benefits and ROI, you will want to know who your audience is. Doing so will provide useful information, such as the following:

- You will understand how key stakeholders want information presented to them. For example, your organization might have a template that has to be used for all new investments. Some stakeholders may prefer a summary while others want a detailed presentation. By catering to their needs, you can increase the odds they will review the material.
- You will know who your detractors are so you can prepare a rebuttal.
- You'll know who will support your project, so you can get them onboard early. Supporters can also share their experiences with

similar purchase requests. You can incorporate this feedback into your proposal and presentation.

Knowing who your key stakeholders are and whose approval is required also helps tailor the message to each person. The following groups are important to cater to when trying to win approval for a new HR system:

- **Executives** will care about the system's cost, its impact on employees and other major initiatives and generally why the new system is needed.
- **Finance** often cares the most about cost, both short term and long term. Knowing the implementation cost and the long-term licensing commitment will be key.
- **Legal** will want to review the contract and determine the risk of going with a particular vendor.
- **IT** often focuses on security, which includes how the company secures its hardware and data and whether the system is compatible with your single sign-on. IT will likely also be interested in how the HR system can integrate with other systems in the organization.
- **Payroll** often reports into finance and isn't directly involved in choosing a new HR system, but how the new HR system shares information with the payroll system is important to them.
- **HR** might be expected to support a new HR system, but that is not always the case. Members of the HR team may have been responsible for choosing the current HR system and don't want to see it go, some may like the current system and others don't want change because they are busy and don't need the distraction. Getting and keeping

your HR team engaged is critical since they are your ambassadors in selling the new system to stakeholders.

Choosing new HR software that lives up to expectations can be difficult. But if you do the research, justify your needs and present all the facts, you might get the green light to buy a system that provides tangible benefits to HR and the entire organization.

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The most common HR tech implementation challenges

Eric St-Jean

HR tech implementations often encounter challenges. Some problems occur early in the implementation, while others don't surface until after go-live.

Project leaders should learn about the most common HR tech implementation challenges so they can attempt to avoid them. Here are some of the most frequently occurring implementation problems, why they happen and how to solve them.

Vacationing employees

A project schedule can clash with vacation schedules due to one of the following reasons:

- The project schedule didn't account for common vacation periods, such as national holidays or the summer.
- The go-live was scheduled for Jan. 1 when many employees are still on holiday break.
- Essential project resources planned extended vacations.

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These potential risks are all preventable. The project leader may have downplayed the risk or been forced to accept it to receive project approval. For example, perhaps they had to ensure the go-live date didn't overlap with another large project or they built the schedule based on the preferred go-live date, which led to a major milestone occurring on a problematic day. To mitigate this risk, reject vacation requests that would affect project milestones and plan to run additional training sessions before and after go-live so team members can catch up on any missed material. Other potential solutions include assigning a backup for all critical project resources and adjusting the schedule to avoid potential problems.

Incomplete requirements

Requirements documents are some of the most important implementation paperwork. They define the features your organization needs and list requirements for security, performance and languages, among other aspects.

However, they are often unclear. Here are a few reasons why the requirements documents can be confusing:

- Document writers assumed a requirement is so obvious that they don't need to mention it.
- The right stakeholders were not consulted.

- Stakeholders provided incorrect information.
- Requirements weren't defined at the project start.
- Team members forgot to add requirements.
- Team members assumed they would clarify the requirements during implementation.
- The data migration plan was not specific enough.

Review the requirements early with the help of subject matter experts to ensure they are clear. As the implementation begins, evaluate the requirements based on the number of questions raised.
Remember that changing requirements once the project starts may result in change requests and additional costs.

Insufficient budget

Getting approval to implement a new HR system can be difficult, especially when company leaders think the project is expensive. However, project leaders may not receive the necessary funds if they do any of the following:

- underestimate licensing costs;
- omit a contingency budget or make it too small;
- omit consultant costs or costs for other temporary help;
- leave out change requests costs;
- underestimate the cost for particular requirements, such as interfaces to other systems; and

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- leave off post-implementation costs for addressing issues, enhancement requests and ongoing support.

Project leaders that already made these mistakes and are out of money have a few options. The first is to approach the executive sponsor for additional funds. The second is to consider scaling back the implementation scope and completing some of the work during the next phase. Another option is working with the implementation partner to find cost-effective alternatives for the most expensive requirements or asking them to move some of the project payments to the next fiscal year.

Change requests

Change requests often come up during contract negotiations with a software vendor or implementation partner. However, the specifics can be unclear. Before signing a contract, make sure relevant stakeholders are clear and in agreement on all of the following:

- What constitutes a change request? For example, how much does the desired feature deviate from the stated requirement before a change request is required?
- Is there a fee for estimating the change request effort? If so, what are the rates for estimating the change request? An hourly rate is often provided for the different types of skill sets, such as a software developer or a project manager.

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- What fees are included in a change request besides the hourly rates for the employees implementing the change?
- What is the process for requesting a change request and having it approved? Ensure that only needed change requests go forward.

If the change request process is not well documented, ask for clarification.

Lack of resources

Implementing a new HR system requires many different subject matter experts and team members. The implementation will likely include, among others, a project manager, a data migration expert and one or more subject matter experts for each module. Consider these questions when assembling a team:

- Are the people assigned to the project knowledgeable about their area of responsibility, and do they have the right skill set for their tasks?
- Do the project team members have time to work on the project?
- Is the project team large enough to implement and support the HR system post-implementation?
- Is there a backup resource assigned to each key area?

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For example, an individual may be too junior for their assigned role. Potential solutions include assigning a more senior member of the team to help them, bringing on additional help or replacing the team member altogether.

Post-implementation support

Once the HR system implementation is complete, maintenance begins. To ensure the transition from the implementation partner to internal resources is smooth, have a detailed plan in place that includes answers to the following questions:

- Who will train employees at go-live and beyond?
- Who is responsible for making configuration changes, and how many people does that require?
- How are employee questions tracked and who answers them?
- Is a third-party vendor on board to help support the HR system, and have they signed a contract?
- Who will create requested reports and dashboards?
- Who will enter and maintain the system data?

Be sure to create a plan before go-live to avoid confusion about who should do what. Problems may take longer to resolve or may never get addressed once the system is live.

If time is of the essence, develop a short-term plan with key stakeholders while creating a long-term strategy.

Inexperienced implementation partner

Many organizations hire an implementation partner. The arrangement comes with multiple benefits, including the partner's experience, HR system knowledge and ability to estimate required project effort.

However, problems with the implementation partner may arise during the project. Here are some common warning signs that a problem is developing:

- missed deadlines;
- multiple change requests;
- configuration issues;
- unaddressed requirements; and
- lack of knowledge in critical areas.

Finding a new implementation partner can be costly and may delay the project. Instead, discuss the issues with the implementation partner and see if they can provide solutions. For example, the partner may replace junior consultants with ones with more experience.
Bringing on more technical resources to support the implementation partner is also an option, but the implementation partner must take part in that decision.

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Cutting corners

At the outset of the project, create a list of implementation requirements.

Everyone on the project should stick to that list. If those requirements are eliminated or only half-implemented, the HR system may be difficult to use, unreliable or lacking key features.

Think about the following points before changing or deferring requirements:

- If a feature isn't implemented, how are end users affected?
- Can the feature be implemented after go-live without severe negative consequences?
- If a feature is complex, can a subset of the feature be implemented instead?
- If migrating all legacy system data before go-live is impossible, how little data can the team migrate and still have the system be functional?
- Will the company approve delaying the implementation of some items?

The end-user experience suffers when you modify or haphazardly drop features. A negative user experience can lead to additional pressure post-implementation to fix issues.

For poorly implemented features, determine the underlying reasons and then develop a plan to address them. The plan could include assigning additional resources to fix the issues, turning the feature off until it's corrected or providing additional feature training.

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7 essentials for better HR software change management

Eric St-Jean

As any project leader knows, HR software implementation challenges don't end at go-live. Teaching employees how to use the new system and solving any software issues post go-live is often just as difficult, if not more so, than implementing the new system.

Creating a plan beforehand can result in a more successful change management process. Here are seven essentials to keep in mind when planning HR tech change management.

1. Create a plan

Discussing change management before go-live is not enough. Allocate time and resources to building a detailed change management plan that includes actions taken and who is responsible for implementing each step.

Review the plan regularly to confirm everything is on track and adjust if necessary for factors like a scope or timeline change.

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2. Secure senior management buy-in

Getting senior management support is crucial. Leadership endorsing new HR software and visibly using it -- for example, using a new timesheet application to approve employee hours -- sends a message to employees that they need to use it, too.

3. Create a communication plan

Consider both the pre- and post-go-live phases of the project when developing a communication plan. The communication team should send employees messages throughout the implementation highlighting the new software's benefits and stressing its good user experience. Messages to employees should increase as go-live approaches.

Continue to sell the new HR software in post-go-live communication and create an open communication channel where employees can log defects or change requests. Also, regularly update employees who have sent defects or change requests. They'll be more likely to continue using the new software and sending in issues reports if they're kept in the loop.

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4. Build time in for communication approvals

Often, an HR leader or someone from an internal communications team must approve messages to employees. Document this process and include it in the schedule so this approval process doesn't clash with deadlines.

5. Develop a detailed training plan

Training is one of the most important aspects of post-go-live. Here are five key considerations when creating a training plan:

- **Provide multiple software learning options.** If possible, create a few different employee learning approaches, such as the vendor's help system, a cheat sheet, instructor-led training and e-learning. Each person learns differently.
- **Be strategic about timing.** Employee training should begin a couple weeks before go-live. Employees will have time to learn everything, but the training isn't so far in the past that they've forgotten the material.
- **Schedule additional manager training.** Managers will need to learn functions like requesting a raise or an employee transfer. Add a few manager-only training sessions.
- **Remember the most important training.** HR or IT employees who will maintain the HR software post-go-live should receive extensive

training that begins before go-live, if time permits, and continues after go-live. The training should cover how to resolve issues, and the implementation partner, software vendor or external training companies may provide it.

- **Add extra training, if necessary.** Some users may require extra training -- for example, a reporting specialist who needs to create custom reports using the software's reporting and business intelligence application. Make sure specific employees receive the training they need.

6. Select champions

Champions are employees who not only support the new HR software but actively help sell it and build excitement. To succeed, they need regular updates, insight into how the HR software will work and collateral for sharing the project's progress. Collateral may include a short presentation or posters for office common spaces.

Make sure champions have all the information and resources for building anticipation for the new software.

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7. Explain any policy changes

Employees may be surprised if the employee policies in the software don't match the company's published policies and guidelines. Perhaps company vacation policy is changing so junior employees only get 10 vacation days, not 14, and employees first learn of that when they see 10 days listed in the software.

Communicate company policy changes to employees before they use the software, so they aren't confused by seemingly incorrect information.

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