Getting a Handle on Your Requirements

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There is a lot to think about before you implement a new HR/Payroll system. All of your requirements from top to bottom need to be completely defined before you can have a successful implementation. So you must first ensure that you have your key project team members engaged in the project and they thoroughly understand your organization's requirements in advance.

Most vendors have a Requirements Workbook that is completed as the first step of an implementation. The information you provided during the sales process is usually not enough detail for the implementation planning phase but can be a good reference point for your project team.

BE PROACTIVE

The Requirements Workbook is extremely important as it becomes the foundation for your configuration, for building test cases, for the vendor support team to understand your unique needs, and for future testing as upgrades are applied to your system. But there is no reason to wait for your "kickoff" meeting or for the vendor to provide you with their version of this workbook to begin this process.

Being prepared before the vendor is engaged will allow you more time to consider and determine your organization's true requirements—not just what you have in your system right now. Those who wait until the vendor assigns this task tend to default to filling in information directly from their current system, or skipping information altogether because of the limited time allotted for this task. This entirely defeats the point of getting a new system.

Preparing in advance means pulling out your policies, bargaining agreements, plan documents, etc. to make sure you include these requirements. Just filling in the details requested may not address all of your organization's unique requirements or needs. Truly examining and documenting what the organization and each stakeholder need may also uncover inconsistencies or unnecessary complexities in your current system.

ASK THE RIGHT QUESTIONS PRIOR TO IMPLEMENTATION

Beyond what is required, this pre-planning phase is also the time to discuss what you desire in your new system. Encourage your key project team members to research any specific needs that may exist at multiple levels of the organization. They may want to schedule time to interview other members of your organization so they can embellish your baseline requirements and make sure that they're inclusive of not only what HR and Payroll might need out of the new system, but also what upper management and line managers may need.

There is a reason you are changing systems, so it's highly likely that you'll have a lot of things to take into consideration. For example, you might ask:

- What are the deficiencies senior and line management are hoping to resolve?
- How can the system better serve your employees?
- Beyond compliance, what HR/Payroll initiatives should the system support?
- For earnings, deductions, and benefits, how are those individual codes set up today? How are they taxed? Are they set up properly?

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ASK THE RIGHT QUESTIONS *(CONTINUED)*

- Are we going to continue with the same pay frequency we have today, are we going to switch frequencies?
- Are there other policy/process changes we want to initiate now that we are getting a new system?
- What kind of PTO plan is ideal? Does your current one match what your plan document and employee handbooks have outlined for your organization?

And don't just think about what you have today—think about what your needs will be for the future. Make sure that whatever system you're selecting, the requirements that you're defining are going to meet your goals five years from now and not just today. Keep in mind that you're selecting a new system because your old one could not meet your organization's current needs. So, some outside the box thinking will serve you well during this process. Push the limit a little bit so that all possible ideas can come to life in your new system.

Plan ahead to ensure all of your business requirements are clear so your new system offers everything you need. Whether you take the task on internally using these tips, or hire a partner who can bring their implementation knowledge and experience to the project, your company will benefit through enhanced productivity both now and in the future.employees leave, including using platforms designed to share content with others across an organization, mentoring programs for new employees and an open platform blog where the more skilled employee can share insights. If you think you might find yourself short-handed, and you know that such a shortfall could leave you with a knowledge gap, it would be wise to have a consultancy on retainer who can step in and do the work. If you require more complex expressions or reporting, and that knowledge cannot be had in-house, you'll want to investigate an outside technical consultant with additional training beyond the skill set of an HR or payroll professional.

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