

2016

*the complete*  
**HRIS  
BUYERS GUIDE**

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**A**

BEGIN THE  
**ADVENTURE**

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*We'll guide you through the journey,  
every step of the way*

# HOW TO USE THIS GUIDE



**PREPARE YOURSELF**

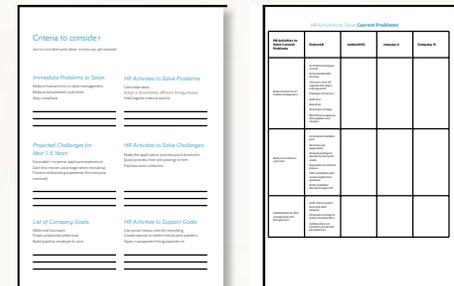
01

HRIS Buyers Guide

This guide provides a comprehensive overview of how to choose an HRIS that suits your company and goals for your HR department. Feel free to start at the beginning and work your way through or jump in at the most relevant steps.

## *Worksheets & Tables*

We've provided worksheets and tables you can print and use during your search for the perfect HRIS.



Look for this symbol to know which pages to print.

## *Spreadsheets*

Does your boss do everything in spreadsheets? You may find that a spreadsheet is the best way to present your findings and make your case to senior management for an HRIS. We've also included an Excel file you can use to crunch the numbers and present to your boss.

# GET YOUR BEARINGS

*To navigate, click on the desired step.*

**01** WHY DO WE NEED AN HRIS?

**03** RESEARCH

**05** SHOP

**07** PRESENT SOLUTION AND GET APPROVAL

**02** KEY PLAYERS AND THEIR CONCERNS

**04** PLAN

**06** CREATE BUSINESS CASE

**08** PURCHASE!

 EXTRAS

 INDEX

# INTRODUCTION

The time has come to find a Human Resources Information System (HRIS) that will bring order to the chaos of employee information that needs tracking, processes that need creating, and tasks that need managing. Because an HRIS won't just be used for HR, but employees, managers, and executives, selecting the right one is vital.

That's why you're doing your due diligence. However, before you even call a vendor, there are some steps to take to make the purchasing process smooth and efficient. Whether you're collaborating with a team or going solo, preparation on your end will save everyone time and resources.

This HRIS Buyer's Guide breaks down the purchasing process into 8 Steps that will help you pinpoint why your company needs an HRIS, determine which features will address those needs, and then put together a compelling business case for the best fit.

*The time has come, let's make the most of it.*



# WHY DO WE NEED AN HRIS?



The biggest mistake most people make when purchasing an HRIS is to think they're shopping for software. They create a list of all the features they want, reach out to a bunch of vendors, see which one offers all or most of the features on the list, factor in budget, and then make a purchase.

Trouble is, you'll find yourself back at square one because the software addresses your most immediate needs at the time of purchase, failing

to take into account unforeseen challenges, and the company's goals and objectives.

So, what should you shop for?

## **A solution.**

That's why you've got to dig deep—an HRIS should last a company at least five to seven years. If you don't shop for the needs of today and tomorrow, you'll be stuck ripping and

replacing your HRIS because you've implemented a system that no longer solves your problems.

The next couple of sections outline important problems and challenges HR faces so you can create the buying criteria for a long term solution.

## *A New Kind of HR*

The workforce is undergoing a drastic change. Within the next 10 years, 43 percent of the US workforce will be eligible for retirement. By this time, 50 percent of the workforce will be Millennials, a generation that has parents and employers alike scratching their heads because Millennial expectations, behaviors, and desires have vastly departed from their predecessors. For instance, Millennials hop from job to job, looking for the next opportunity to build their skills, gain responsibility, and find the perfect cultural fit.

Because of the workforce's changing dynamics, greater demands have been placed on HR to handle more than the transactional tasks necessary for keeping the company in business, but also to provide the strategic game plan for creating an effective workforce made primarily of nomads.

And it's not just large companies finding themselves in need of a strategic HR department. More and more small businesses find themselves needing the insight HR can provide in order to find and keep their workers in today's employee-driven market.

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Many think that human resources begins when a firm grows large enough to have a formal human resource department . . . However, the truth is that HR strategy starts when a firm is a single person.

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*Entrepreneurial Insights*

<http://bit.ly/1CKc3B7>How does all this translate to buying an HRIS?

”

## *Criteria for Selecting an HRIS*

There are two versions of HR to shop for—traditional HR and strategic HR. Because of HR's immediate pain handling the traditional tasks of data management and compliance, their biggest mistake is feature-based shopping that focuses too much on automation. If handling transactional tasks, such as processing paperwork, was the only value HR provided, then technology would have replaced a whole field of professionals by now.

However, with today's changing workforce dynamics, HR clearly plays a vital and relevant role within the company, and shopping for the needs of strategic HR means finding a system that not only automates the transactional, but also elevates those tasks (so they provide the most business value) and supports strategic activities.

When empowered to behave strategically, HR acts as the company's internal compass, aligning employees with the company's values and goals.

### *The measuring criteria for finding an HRIS is:*

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**01** HR ACTIVITIES TO SOLVE  
**CURRENT PROBLEMS**

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**02** HR ACTIVITIES TO FACE  
**UPCOMING CHALLENGES**

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**03** HR ACTIVITIES TO ALIGN  
**EMPLOYEES WITH COMPANY  
VALUES AND GOALS**

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## Criteria to consider

(We've included some ideas to help you get started):

### IMMEDIATE PROBLEMS TO SOLVE:

- Reduce human error in data management
- Reduce recruitment cycle time
- Stay compliant

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### HR ACTIVITIES TO SOLVE PROBLEMS:

- Centralize data
- Adopt a streamlined, efficient hiring process
- Hold regular internal audits

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### LIST OF COMPANY GOALS:

- Millennial Outreach
- Fewer unplanned absences
- Build positive employer brand

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### PROJECTED CHALLENGES FOR NEXT 1-5 YEARS:

- Favorable + improve applicant experience
- Gain first-mover advantage when recruiting
- Positive onboarding experience (for everyone involved)

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### HR ACTIVITIES TO SOLVE CHALLENGES:

- Make the application process quick and smooth
- Quick process from job posting to hire
- Painless data collection

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### HR ACTIVITIES TO SUPPORT GOALS:

- Use social media sites for recruiting
- Create reports to detect trends and patterns
- Open, transparent hiring experience

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# KEY PLAYERS AND THEIR CONCERNS



An HRIS system is unique in that it doesn't affect just HR, but other employees and departments as well. So, it's important to determine who will be most impacted by this change, and what concerns these Key Players will have about implementing an HRIS. This doesn't mean the Key Players need to be involved in the purchasing process (in fact, the fewer the better or you'll end up with too many cooks in the kitchen, so to speak), but you can make your business case for an HRIS

much stronger if you demonstrate that you've done your due diligence on how the software will affect other departments.

In addition, you will probably need approval from the company's executives and/or business owners, so understanding and addressing their concerns can provide the pivotal information necessary for your business case.



*Key Players  
often include:*

OTHER HR TEAM MEMBERS  
PAYROLL  
FINANCE  
IT  
MANAGERS  
EXECUTIVE TEAM MEMBERS  
(I.E. CEO, CFO, ETC)



*Concerns my Key Players need to have addressed:*



KEY PLAYER \_\_\_\_\_  
CONCERNS \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# RESEARCH

Now that you know what you need, it's time to determine which features fit your buying criteria. This will help you sort through the noise of vendors competing for your attention so you can focus on the products that will actually provide what you're looking for.

We've provided charts with some ideas to get you started. Hold on to these charts for when you're ready to shop so you can score your top three solutions for usability.

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**Note:**

If you'd like to learn more about the technical side of HR software, such as SaaS vs In-house and On-premise software or Best of Breed vs. All-In-One, check out our **Index**.

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Remember to look for this symbol to know which pages to print.



# HR ACTIVITIES TO SOLVE CURRENT PROBLEMS



When testing each solution, don't forget to rate usability!

1 (Difficult) ←————→ 5 (Easy)

HR ACTIVITIES TO SOLVE CURRENT PROBLEMS	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Reduce human error in data management	<i>Centralized employee records</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Customizable data tracking</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Electronic time-off requests and single-click approval</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee self service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Audit trail</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Reporting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Permission settings</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Work Flows to approve data updates and changes</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Reduce recruitment cycle time	<i>Centralized candidate pool</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Electronic job applications</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Push job postings to job boards and social media</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Organized recruitment process</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Filter candidates with custom application questions</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Email candidate directly through ATS</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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HR ACTIVITIES TO SOLVE CURRENT PROBLEMS	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Collaboration for data management and hiring process	<i>Audit Trail to protect and verify data integrity</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Permission settings to protect sensitive data</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Collaborators can comment on and rate job applicants</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Stay compliant	<i>Email alerts with expiration reminders</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Training tracking</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Track employee information</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Historical data</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Permission group wsettings</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Benefit tracking</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Create time off policies</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Efficient data entry	<i>EEO reporting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee self-onboarding</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee self-service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Manager self-service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Efficient data retrieval	<i>Implementation</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Electronic employee records</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Custom reports</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Export or email reporting capabilities</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Reports sharable in system</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Historical data</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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HR ACTIVITIES TO SOLVE CURRENT PROBLEMS	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Organized processes	<i>Electronic signatures</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Performance reviews</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Reporting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>PTO work flows</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Email alerts</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Applicant tracking</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Organizational chart</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Empower employees	<i>Mobile app</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee directory</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Future PTO balance calculations</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Time off history</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>List and access to important links</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Access to important documents, such as employee handbooks</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Alerts for upcoming training and expirations</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee goal setting and progress tracking</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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HR ACTIVITIES TO SOLVE CURRENT PROBLEMS	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Empower management	<i>Change request workflows (bonus, promotions, etc.)</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Reporting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Mobile app</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Multiple approval PTO</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Multi-tiered approval workflows</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Who's out calendar</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Filtering to show only relevant information</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Emergency contact information</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Manage multiple offices or international locations	<i>Track and report on compensation in relevant currencies</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Software translated into multiple languages</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Custom translation capabilities</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Set software to relevant time zone</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Filter company calendar for relevant holidays</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Custom Holiday and PTO policies</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Minimize distractions	<i>Employee self-service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Manager self-service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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# HR ACTIVITIES TO SOLVE FUTURE CHALLENGES

When testing each solution, don't forget to rate usability!

1 (Difficult) ←————→ 5 (Easy)

HR ACTIVITIES TO SOLVE FUTURE CHALLENGES	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Favorable applicant experience + improve applicant experience	ATS	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Email candidate directly through ATS	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Gain first-mover advantage when recruiting	Efficient recruiting process	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Positive onboarding experience (for everyone involved)	Assign tasks to coworkers with automatic reminders	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Track completion of onboarding tasks	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Electronic signature	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Electronic document storage	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Assign onboarding tasks to employees	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Insulate against risk and fraud	Audit trail	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Multi-tier approval process for changes	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	Custom permission groups	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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# HR ACTIVITIES TO SUPPORT COMPANY GOALS/VALUES

When testing each solution, don't forget to rate usability!

1 (Difficult) ←————→ 5 (Easy)

HR ACTIVITIES TO SUPPORT COMPANY GOALS/VALUES	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Help company make proactive decisions	<i>Custom workflows</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Custom reporting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Increase retention	<i>Engaging onboarding</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Automatic emails to introduce new hires</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Help new hires make meaningful connections</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Millennial outreach	<i>Mobile app</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Push job postings to social media outlets</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Electronic signatures</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Modern design and interface</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Single sign-on</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Paperless onboarding</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee self-service</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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HR ACTIVITIES TO SUPPORT COMPANY GOALS/VALUES	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
		Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Build positive employer brand	<i>Simple and intuitive application experience for candidates</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Quick and organized recruiting process</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>ATS email capability</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Simple and intuitive experience for applying online</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Electronic signatures</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Engaging and automated onboarding process</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Mobile app</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Employee goal setting</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Build culture	<i>Email reminders for employee birthdays and work anniversaries</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Automatic emails to introduce new hires</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Company announcements board</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
	<i>Alter user interface to reflect company logo and colors</i>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
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# ADDRESSING KEY PLAYERS' CONCERNS

When testing each solution, don't forget to rate usability!

1 (Difficult) ←————→ 5 (Easy)

KEY PLAYER	CONCERN	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
			Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
HR Team Members	Current processes vs. new processes Integration with legacy software Compliance Ease of use Implementing new system	Custom workflows	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom approval processes	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Open API	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Import/Export	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom reporting	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Ability to track and store custom data needs	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Audit trail	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Permission settings	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Easy to learn and use	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
IT	Data security Software setup Software maintenance	Enterprise level encryption	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Constant security evaluations	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Firewalling	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Penetration testing	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Trustee Certified	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Safe Harbor Compliant	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Password protected login	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Automatic logout when idle	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Full implementation	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Automatic updates	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Ongoing customer support	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Software training	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				
		Page total							
		Running total							



KEY PLAYER	CONCERN	FEATURE	BAMBOOHR		COMPANY A		COMPANY B		NOTES
			Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	Includes Feature	Usability (1-5)	
Payroll/ Finance	Integration with payroll software  Find a new payroll software	Open API	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Import/Export	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Payroll solution (partners or built in)	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Managers	Workflows Adoptability Accessibility	Custom workflows	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom approvals	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		PTO request/approval workflow	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		ICal feed to link PTO/holiday calendars with personal/company calendar	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Mobile app	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
Executive Team Members	Cost ROI (see "Build Business Case") Compliance Adoptability New processes Data security	Total costs	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom reporting	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Ability to track and store custom data needs	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Audit trail	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Permission settings	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Easy to learn and use	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom workflows	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Custom approvals	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		
		Page total							
		Running total							
		<b>GRAND TOTAL</b>							



# PLAN

Now that you know which features you need, it's time to create a hard and fast deadline for your purchasing decision. This might require collaborating with some or all of your Key Players, so establish a timeline for which everyone is accountable. It's easy to push off change indefinitely, and without a timeline, you might be just as stuck a year from now as you are today.



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My date for  
launching an HRIS  
company wide is:

.....

## *Factors to consider when creating your timeline:*

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### Vendor response time

Some are proactive and will reach out quickly. Others drag their feet and take several days to a week before chatting with you.

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### Soft launch to company management

This gives you time to work out any kinks and build familiarity with the product throughout the company, which helps with adoptability and training. Employees can go to their managers if they get stuck using the software rather than to you or IT.

---

### Implementation timeline

Although most HR software requires implementation, they vary when it comes to duration. Some only take up to 7 weeks, while others take up to 6-12 months.

# SHOP

You are armed and ready to start contacting vendors for demos, free trial accounts, and price quotes. Use your buying criteria to disqualify vendors that don't meet your needs and to compare and contrast platforms.



### *Things to consider when shopping for software:*

- It doesn't matter how good a solution looks on paper if it's a burden to use. A live demo doesn't compare to testing the account yourself because the people doing a demo know how to hide usability issues. You want to encounter those before you spend money and roll out the software company-wide.
- If you don't have time to try each vendor's software then, during the demo, ask to see a workflow (rather than just a feature). It pays to identify your ten most common workflows and then time each vendor on how long it takes to complete each one because these are the workflows you'll have to do over and over again. Or you can count the number of clicks it takes each vendor to accomplish each workflow, which is an effective way to create an adoptability filter into your selection process.
- Focus on the usability of workflows, rather than features. It's the easiest way to shop for adoptability.
- Watch out for a vendor who's unwilling to say "we don't do that." If the answer to every question is "yes," then something is probably wrong.
- Customer reviews provide an incredible amount of value and can easily be found on the internet. It's easy for a sales rep to brag about their software, but it doesn't hurt

to see what people who don't get a commission have to say. Even if not all customer reviews are genuine, it's usually easy to decipher which are real and which come from a company's marketing team. Here are some things to look for when analyzing customer reviews:

- Does it look like something said by a real human or a marketing department? You can usually tell.
- Do you find the same three people doing reviews on all the review sites? Companies will sometimes get permission from a select few clients to use their name. However, the vendor writes the review and then posts it to all the review sites with minor changes so it looks authentic.
- Is the company's vision something you can support? Vision steers a

company and shapes the product it makes. And when you buy software, you invest in the vision behind it, so that vision affects your experience in the future. If their mission is something you'll outgrow, then you'll outgrow the company. Make sure the software company cares about solving the challenges that will matter to you tomorrow.

- Ask for the customer support telephone number. Before you're a customer, the vendor will roll out the red carpet and immediately respond to your every need. The question is, how will they treat you once you're a paying customer? When you become a customer, you're going to call a different number, and it's not sales. So, before you buy, call support, see how they treat you. Do they dismiss you? Ask them a "how-to."

The key is to simulate a discussion you anticipate having with support and see how it goes.

- Beware the "what if" sale. Vendors that focus on checklist style development will try to oversell you on "what-if" scenarios. They make you believe you need to prepare for all these things you've never experienced (and probably never will). That's why it's so important to shape your present and future needs before talking to a vendor.

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Once you've got a feel for what's available, narrow your choices down to your top three vendors and fill out the charts provided in Step Three. In the next step, you'll create a business case for getting the necessary approval for your top pick.

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# CREATE BUSINESS CASE

No matter how perfect a solution seems, if you can't get the decision makers on board, then chances of getting approval are slim to none. You can build a good business case for your top solution by using the worksheets you've filled out so far. However, budget will be the biggest pushback you receive. In order to make your business case truly solid, you need to quantify the cost of doing things the same versus the cost of change.

Let's start with something easy. Going paperless alone can save your company hundreds, even thousands, of dollars per year—in ways you wouldn't expect.

Fill out this chart created by K.J. McCorry, author of *Organize Your Work Day in No Time*, to find out how much electronic signatures and document storage will save you per year.



# ELECTRONIC SIGNATURES AND DOCUMENT STORAGE SAVINGS

## HOW TO USE THIS PAGE:

To build a business case specific to your company, fill out the third column.

For a quick estimate, use the numbers provided in the fourth column.

TYPE OF COST	HOW TO CONFIGURE	YOUR COMPANY'S ESTIMATED ANNUAL PAPER COST	ESTIMATED ANNUAL PAPER COST FOR AVG. COMPANY
Paper	Monthly paper cost multiplied by 12 months		\$1,123 per knowledge employee per year
Onsite file storage (filing cabinets)	Number of filing cabinets multiplied by 15.7 square feet, multiplied by the cost per square foot of space		\$1,500 per cabinet per year
Onsite file storage (bankers boxes)	Number of shelving units (with bankers boxes), multiplied by the square footage used, multiplied by the cost of rental space per square foot		\$57.61 per box
Offsite file storage	Monthly cost of offsite storage multiplied by 12 months		\$60.95 per storage unit
Printer/copy machines	Annual printer/copy machine rental cost plus annual printer/copy machine maintenance cost		\$177 per month for a Sharp AR-M277
Printer/copier toners	Printer/copier/fax toners purchased (for the year)		Included in above cost
Filing and office supplies	Cost of filing supplies such as file folders, hanging files, tabs, labels, binders, and so on (for the year)		\$756
Employee time	(Approx. number of daily hrs. per office worker managing paper) x (number of office workers) x (avg. hourly wage) x (number of workdays per year)		408 hours per employee per year.
	<b>TOTAL COST</b>		



Now let's get a little more granular and quantify the current time and costs for performing HR tasks vs. doing those same tasks with an HRIS. (At this point, you may have decided on the perfect solution and want to create a business case around just that. Go for it!)

We've included some common examples to help you get started.

Some tips to keep in mind when filling this out:

- Try to be as specific to the needs of your company as possible. Is there a particular report that's a nightmare to create?
- Remember that list of current problems you need to fix? That's a great source for ideas.

TASK	COST OF EMPLOYEE TIME*	COST OF EMPLOYEE TIME SPENT USING BAMBOOHR	COST OF EMPLOYEE TIME SPENT USING COMPANY A	COST OF EMPLOYEE TIME SPENT USING COMPANY B
<i>Create a [Name Here] report</i>				
<i>Calculate an employee's future time-off balance</i>				
<i>Create and post a job description</i>				
<i>Process a new hire's paperwork</i>				
<b>GRAND TOTALS:</b>				

\* Number of hours per office worker x number of office workers x hourly wage x number of workdays per year.

**Adopting an HRIS will save the company \_\_\_\_\_ a year.**

**After factoring in the cost of an HRIS, this translates to a net savings of \_\_\_\_\_ a year.**

Now that you've created a case for the cost effectiveness of changing to your top HRIS, you need to illustrate the additional value the company will gain because of the activities you'll now be free to do. You'll have a hard time quantifying the impact of doing strategic work, but here are some key data points to help you out:

- Higher employee engagement increases productivity (22%), higher profitability (21%) and lower absenteeism (37%).

• For companies that focus on company culture:

- Revenues increased four times faster
- Job creation rates grew seven times higher
- Stock prices increased twelve times faster
- Profits climbed 750% higher
- Net income grew 700%
- Customer satisfaction doubled.
- Reduced turnover (*Corporate Culture and Performance*, John P. Kotter, James L. Kessett)

- Happier workers help their colleagues 33% more often than unhappy ones. Happy employees also achieve their goals 31% more often, and are 36% more motivated in their work.

Also, remember the goals, current problems, and future challenges along with the corresponding HR activities you wrote down? This is where they'll come in handy.

# PRESENT SOLUTION AND GET APPROVAL

Now that you've done your due diligence, it's time to get your solution approved. That might mean presenting to all your Key Players or just the final decision makers. Whatever the situation may be, you've now got

the information necessary to put their concerns to rest and create a compelling case for why an HRIS is necessary for the success of the entire company.

**When presenting your solution:**

Address the current problems, future challenges, and goals for both you and the company.

- Be sure to address the primary concerns for each Key Player.
- List what activities you can do that will alleviate the current problems, be proactive about future challenges, and help the company reach its goals.
- Outline how your chosen HRIS will support your activities. Show any relevant materials the vendor provides while presenting the solution.
- Spell out the costs of following the status quo.
- Show how much money will be saved by implementing your chosen system.
- Show the necessary price quotes, including the net savings you calculated. Hopefully the decision maker will see how the solution pays for itself!

**If you experience push-back:**

Sometimes getting your Key Players to agree can be the hardest part of this entire process. In such cases, it is especially important to rally around shared needs and a common purpose. For example, the common purpose for an HRIS is more than automating, but elevating the work you do to positively impact everyone in the company.

**If you receive push-back from Key Players in HR:**

Key Players in HR can be opposed to purchasing an HRIS because they're afraid of their job being automated. This will translate to reluctance and pushback, but if you can open their eyes to the greater work they can perform by freeing themselves from operational activities, they should come around.

***Last but not least:  
Good luck!***

# PURCHASE!

This is the fun part! Now that you've received approval from the decision makers, you're ready to get the ball rolling and make a purchase. Your selected vendor will provide instructions on the best way to sign up.

# INDEX



## EDUCATE YOURSELF

If you're looking to unleash your inner nerd and learn all there is to know about the world of SaaS, cloud vs. on-premise, and Best of Breed vs. All-in-One, then you've come to the right place!

### **Time to get SaaSy.**

Like any industry, the world of SaaS is filled with words and acronyms that only make sense to the people who make a living developing the stuff. Not to worry! Here are the basic facts you need to know about SaaS, On-Premise, and In-house software:

### **What is SaaS?**

A subscription based software that you pay for month-to-month. Some companies make you sign a contract and some let you cancel at any time. The data gets stored in the "cloud," which means that rather than store all that employee data on your hard drive or company servers, it gets stored on the software's servers. Because that data is stored off-site, you use the internet to access it. This means you can access the data from any device with a web-browser and any location that has internet service.



"Your IT department may be consciously moving to Cloud solutions based on a number of factors, including a strategy to reduce IT resources, a reduction in hardware and servers, simplification of interfaces, empowerment of mobile technology, standardization on a single reporting/analytical tool and streamlining application maintenance and upgrades. Using this strategy, IT could make a strong case that Cloud solutions have minimal impact on their internal resources, offer lower or almost zero maintenance requirements, and provide a richer application experience to the end users, which typically results in higher end-user adoption."

<http://www.hrmsolutions.com/resources/blog/cloud-vs-on-premise/>



### **Advantages to Using SaaS software:**

Shorter setup time. Some reasons include: not built from scratch by your developers and/or not reliant on your IT department to create or install.

- The vendor is responsible for maintaining and updating your software.
- Data stored on the cloud means you don't have to be at your desk or even use company equipment to do your job. If you need to take care of a sick child, go to an off-site meeting, or can't come to the office due to inclement weather, you can still get work done. Also, managers working on a jobsite can easily access important employee information, like emergency contact details.
- Updates are rolled out at no additional cost to you. This prevents needing to get constant budget approvals whenever a new

version gets released (à la installed software) or being left with an outdated, unsupported version that becomes obsolete.

- Changing to a new package or plan doesn't require a complete installation of the system.
- Cost is typically based off employee headcount because the necessary data storage and customer support will change as your company increases.
- The vendor manages the data on remote servers, which means if disaster strikes your office, the data is not lost.

### **Disadvantages to Using SaaS software:**

- Not customizable in that you can't have the company's developers create a solution from the ground up specifically tailored to the needs of your company. Either you find a solution that best matches your

needs or you change your processes to fit the system.

- Full integration into legacy systems can be challenging depending on each system's API.
- Your access to the software can be disrupted due to a faulty internet connection, vendor maintenance, and the vendor going out of business.
- Getting your company to adapt to new processes and workflows after implementing the software.

### **On-Premise Software**

Software hosted on-site, often requires you to build a server to host the data, install the software, and then configure it. As a result, your IT department handles the updating, maintenance, and overall support required to operate the software, requiring them to dedicate their resources and make your HRIS a priority. Typically with

this approach to software, you have to pay for and reinstall new versions with updates. Should you choose not to and stay with the version you purchased, what often happens is the software company stops supporting your version after a certain period of time.

#### **Advantages to On-Premise Software:**

- More in-depth customization, allowing more flexibility to shape the software around your processes rather than the other way around.
- Data kept on your servers which, with a dedicated and skilled IT department, can make it more secure than a SaaS solution. This can be important depending on the country or industry you're in, and your compliance requirements for data hosting.

#### **Disadvantages to On-Premise Software:**

- Requires the time and resources of your IT department. If they are understaffed, inexperienced, or have other projects they view as bigger priorities, you'll often be left fending for yourself, either creating workarounds because you're not getting the updates you need, or

caught in a holding pattern because of an unresolved issue preventing you from using the software.

- Implementation takes longer because of the setup required on your end, along with being dependent on your IT department's availability.
- Customizations and upgrades are expensive because you're changing the code to the actual software.
- Whenever you want to add users, you have to purchase more licenses.
- Usage limited to the machine the software is installed on, limiting your ability to work from home, at an off-site location, etc.
- Data located on your company's servers, which means if they crash, your data is lost.
- Additional fees apply to diagnosing and fixing the software should something go wrong.

#### **In-house Software**

Software built by your company based on the specifications, screen designs, system edits, and reporting requirements submitted by HR. This solution is built from the ground up by either your company's development team or a hired third party. This is often perceived as less expensive by the

companies who use their internal resources to build it, but they often do not account for the man-hours required to plan, create, test, maintain, and update the software. Nor do they account for the resources required for data security, troubleshooting, and training. Much like On-Premise software, the data is housed on your own servers.

#### **Advantages to In-house Software**

- You have complete control over the software, it's features, its functionality, its customizations.
- Your company owns the code.
- The software is tailored to your business needs.

#### **Disadvantages to In-house Software**

- The man-hours required to build a system from scratch. HR will have to submit specifications, screen designs, system edits, and reporting requirements. Development will have to create the software and test it for bugs, and IT will have to maintain it and provide full-time support. Any changes or updates needed in the future will be dependent on your development team's availability. If the software isn't a priority for IT, you're stuck with a system no one can use.

- On-going training falls to HR and IT, eating up even more of your time and resources.
- Changes could affect the usability of in-house software: new versions of operating systems and back-end applications, changing business needs, and integration with other applications.

### ***Best of Breed vs. All-in-One?***

Two terms that get thrown around a lot in the HRMS space are "Best of Breed" and "All-In-One." And the debate around which one is best rivals the age old argument over string and loop theory among physicists. Luckily, you don't need to be a rocket scientist to determine which platform will fit your needs.

#### **All-in-one?**

All-in-one HR platforms seek to provide a solution for every HR function imaginable, from payroll to benefit enrollment to time and attendance.

### **Advantages to All-in-one?**

- So long as the all-in-one solution has all your needs covered, you don't have to worry about integrating multiple HR softwares.
- When done well, the "look and feel" remains consistent throughout the user experience because the entire user interface is from one vendor.
- Purchasing from one vendor instead of several means the cost is often less expensive.

### **Disadvantages to All-in-one?**

- Feature performance can be average at best. Because they don't specialize in a single, functional aspect, some features might be really stellar while others don't have the development and support necessary to make them great.
- If it fails to meet all your needs, you'll have to rip and replace the system, wasting previously invested resources and requiring even more time and money.
- They typically don't integrate well with other systems. So when you find a separate, specialized solution you want to try for a specific problem, you're stuck in their walled garden.

- Due to the complexity of such systems, they are difficult to upgrade and don't roll out new features as frequently as Best of Breed.
- In most cases, you pay for way more features than you'll ever use.
- Interdependency across the platform slows innovation.

### **Best of Breed?**

Best of Breed HR platforms are focused on doing a single task well and will outperform the equivalent feature in an All-in-One platform. Companies typically use several Best of Breed softwares to create a platform that specifically addresses their needs.

### **Advantages to Best of Breed?**

- Using multiple platforms allows you to pick software that best fit your company's needs.
- Avoid paying for features you'll never use.
- Scalability. As your needs change, you can add or replace individual platforms rather than rip and replace your entire system.
- Able to frequently roll out new features and updates, which means bugs get fixed faster, the interface is

constantly being improved, and more innovation.

- If your company is spread globally, using multiple platforms allows you to address the unique needs for each location.
- You get maximum innovation for every solution you invest in.

#### **Disadvantages to Best of Breed?**

- If using multiple platforms, your finance department will have to handle billing with multiple vendors as opposed to one.
- Depending on the vendors you select, updating data across systems can require some effort on your part.



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HR directors are discovering that a single cloud solution seldom satisfies all of their requirements and there are options available to address specific HR topics. This realization supports the need for hybrid HR environments . . .

<http://www.ngahr.com/blog/hr-focus-2015-1-what-will-2015-bring-hr-technology>

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# EXTRAS



**PRINT MORE  
WORKSHEETS**









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