

HCM BUYING CONSIDERATIONS

Valuable Questions to Ask When Procuring a New HR/Payroll Platform

Is the solution an all-in-one? What HR/Payroll modules are available?

- ✓ Human Resources
- ✓ Employee Portal
- ✓ Payroll
- ✓ Time & Attendance
- ✓ Benefit Administration
- ✓ Performance Management
- ✓ Headcount Planning
- ✓ Recruiting
- ✓ Learning Management
- ✓ Employee Surveys
- ✓ COBRA/ACA
- ✓ E-Verify
- ✓ Carrier Connection
- ✓ 401k Integration
- ✓ HSA/FSA Administration
- ✓ Spend Management / Expenses
- ✓ Application Single Sign On
- ✓ Device Management (laptops, peripherals)

Technology Questions

- How does the system integrate with accounting systems?
- Are the modules part of the single source solution or are they integrated together?
- How much does the publisher invest in Research and Development of the product?
- Is there a native mobile application?
- Describe the security protocols? Does the system provide Two-Factor Authentication?
- How granular are user security settings? Can security be set down to a specific field?
- Is there an audit trail for change management?
- Is the solution scalable by module and number of employees?
- How intuitive is the user interface?
- Can the system be customized for specific business policies, processes, and workflows?
- How does the system address off-cycle payrolls? Is there an additional charge?
- Can standard reports be customized? Can you easily create custom reports and analytics?

Onboarding & Compliance Questions

- Describe onboarding. Is it automated and online? What is the level of customization?
- Does the system automatically assign payroll taxes based on home and work address?
- Does the system have automated workflows for onboarding, employee changes, etc.?
- Describe the approval/notification process for employee changes, such as job promotion.
- How does the solution address local, state, and federal compliance requirements, such as overtime and paid time off?
- How does the solution address labor laws, tax regulations, and data protection laws?
- How are payroll tax filings generated? Monthly/Quarterly/Annual reporting?

Implementation Questions

- How is implementation of the solution addressed? Is it a low-touch 'train the trainer' or a high-touch turnkey implementation?
- Describe the implementation team assigned. Is a Project Manager assigned to the implementation?
- What is the typical implementation timeline?
- Who assembles and migrates the initial data during the implementation?

Post-Implementation Questions

- Describe post-implementation support and training.
- How are employees trained to maximize use of the solution?
- What type of ongoing customer support is available? Email, chatbot, live phone support?
- Is a member of the support team assigned to the customer? Is that support team member an implementation specialist?