

Buyer's Guide Checklist

What You Need to Make a Stress-Free HR & Payroll Switch

Keep this checklist handy to help you identify the best HR and payroll choice for your business.



When you're looking for a new solution, it's helpful to gather information before you meet with a vendor. Here's some important info to have on hand:

- Specific issues with your current provider
- Organization size
- Categories of employees in the workforce (hourly, salaried, independent contractors, etc.)
- Biggest compliance risks and challenges
- Upskill and reskill plans
- Budget

Assess Your Organization's Needs and Wishlist

Conduct a needs analysis and build a wishlist to identify the most critical features of your organization's next HR and payroll software, so you'll have a clear focus during the next step of the buying process. Reaching a consensus with your group of stakeholders ensures a smoother course of action.

- One platform that scales with you
- Proven, easy implementation
- Great service with short wait times
- Easy access to custom reports
- Easily process end-of-year tax statements
- Facilitate cultural connection

Consider the capabilities important to each stakeholder.

HR

- Benefits Administration
- Time & Attendance
- Recruiting
- Onboarding
- Learning/Training
- Regulatory Compliance
- Insights & Reporting
- Employee Engagement
 - Social collaboration tools
 - Peer recognition capabilities
 - Custom employee surveys



Payroll

- Process automation
- Compliance
- Reporting

IT

- Deployment model
- Integration Capabilities
- Security
- Implementation
- Performance

Finance

- Total expected costs
- Align with financial goals
- ROI tracking

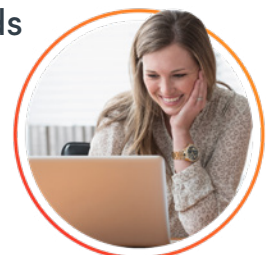
Executives & Leaders

- Supports strategic goals
- Track record
- Ease of use

Compare Providers

Ask providers about:

- Their **experience** with other businesses in your industry, or of your company size
- How they **practice what they preach** and use their own product
- How they **innovate** and plan to support your current and future needs
- What the **implementation** process looks like
- How they **support clients**, including call wait times
- Which kinds of **resources** are available 24/7



Do your research

Don't take the provider's word for their services, listen to your peers:

- Verify the information on review sites like G2 where users submit feedback.

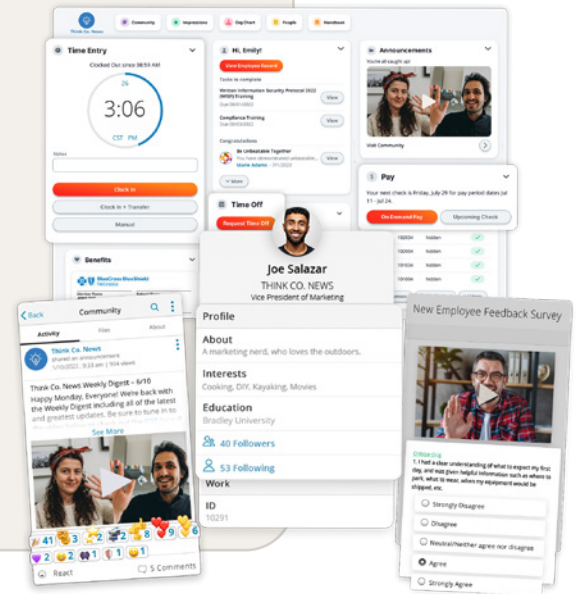


Additional Resources

How Paylocity Can Help

As a leading provider of cloud-based HR and payroll software solutions, Paylocity can help your business make strategic HR decisions, while improving employee engagement and making your organization an even better place to work.

Get a guided tour of our solutions. →



For more context, don't miss our buyer's guide, **Make a Stress-Free HR & Payroll Switch.**