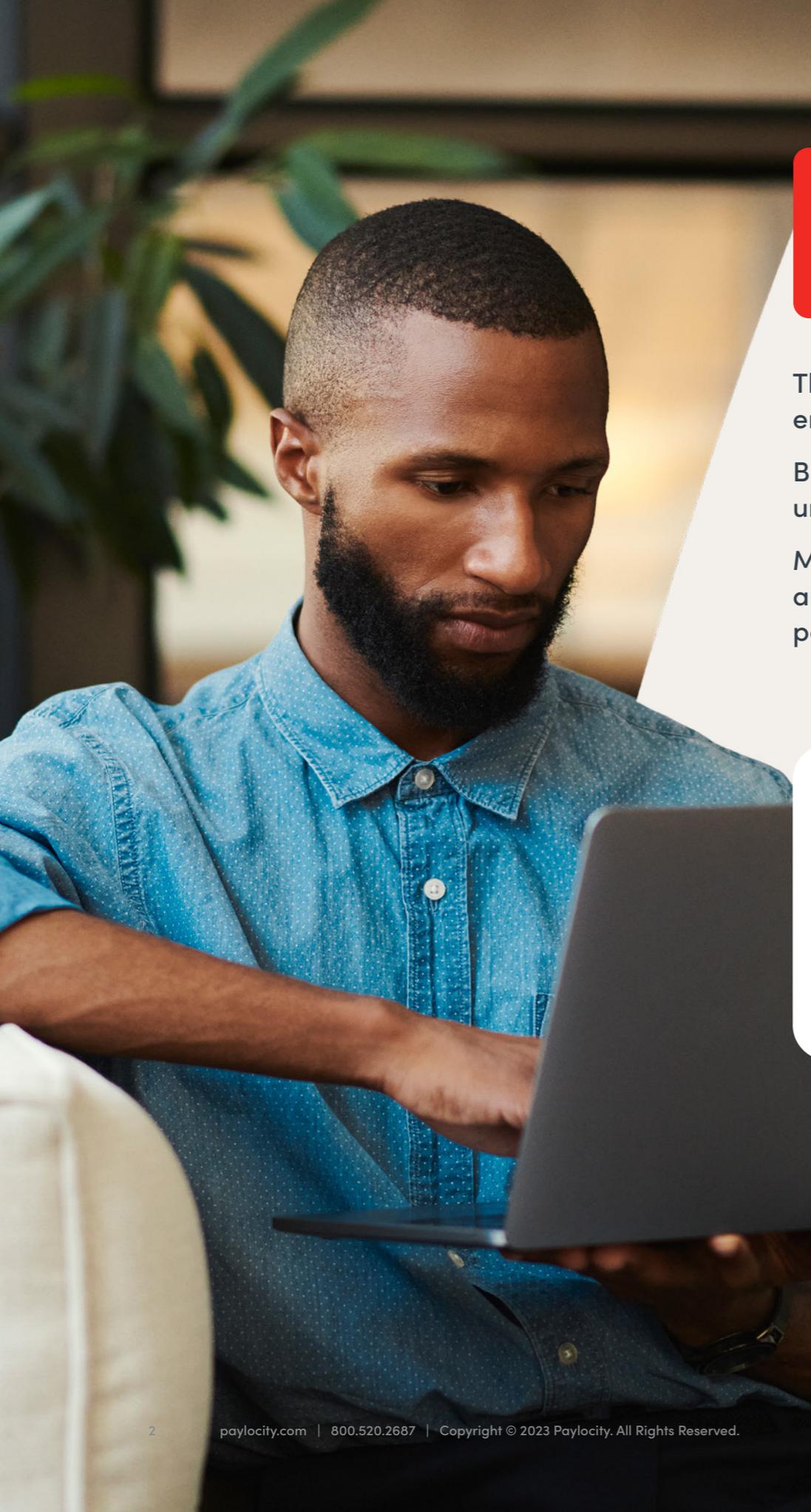


A Buyer's Guide

# Make a Stress-Free HR & Payroll Switch





The right HR and payroll software has the power to drive your organization forward.

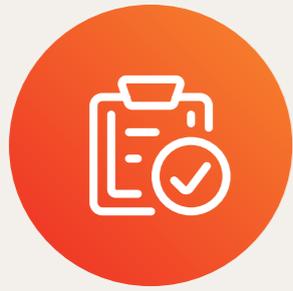
The best solution reduces duplicate work, increases productivity, and enhances the employee experience – all in one – through connection and the power of data.

But switching providers can be time-consuming and overwhelming, especially in these uncertain economic times or if you've made a recent change.

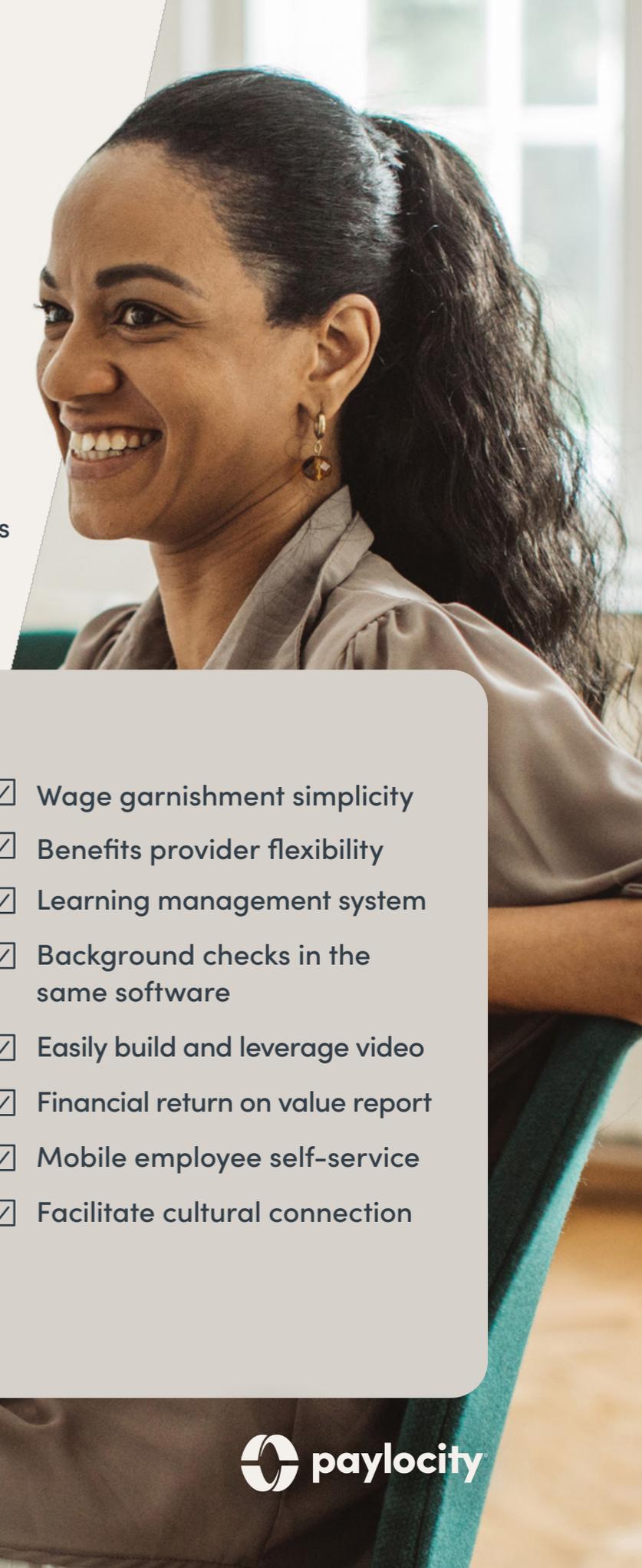
Making a smooth decision requires understanding your organization's specific needs and finding the right provider that goes beyond the basic capabilities of HR and payroll software.

**This guide will explain the key steps in the buying process:**

- Assess Your Organization's Needs**
- Compare Providers**
- Get Stakeholder Buy-In**



# How to Assess Your Organization's Needs



Within any organization, there are likely several stakeholders who have overlapping and often conflicting priorities, so it's essential to conduct a needs assessment before switching providers.

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.

## Questions to Begin Your Needs Analysis:

- Why are you looking to make a switch?
- What's your timeline for switching?
- What are your biggest compliance risks and challenges?
- What are your plans to address upskilling and reskilling employees?
- Has a budget been established or approved?
  - How much do you pay per employee for your current solution?
- Do you have unique organizational needs?
- How would a better HR solution align with the initiatives you're focusing on this year?
- How will you measure return on investment?

## Consider Your Wishlist:

- One platform that scales with you
- Proven, easy implementation
- Great service with short wait times
- Easy access to custom reports
- Process payroll for full-time, part-time and contract
- Easily process end-of-year tax statements
- Pay transparency and benchmarking
- Wage garnishment simplicity
- Benefits provider flexibility
- Learning management system
- Background checks in the same software
- Easily build and leverage video
- Financial return on value report
- Mobile employee self-service
- Facilitate cultural connection

## When assessing a new software, the buying committee spans the organization. Here's what's important to each stakeholder.



**HR and Payroll:** How the software reduces administrative burden by automating processes, giving employees access to self-service tools, and consolidating data and documents is important to them.

### Questions to ask:

- What are your specific HR and payroll pain points?
  - Why are you looking for something new?
- Does it make strategic HR initiatives possible by automating processes and giving HR practitioners more time back in their day?
- Is the software compliant with the latest laws and regulations?
- How does it securely store employee data?
- What are the software's reporting capabilities?



**IT:** The software's compatibility with existing systems, as well as its ability to scale and integrate with other systems is valuable. They'll ask questions to understand if the software's ease of use will decrease employees' day-to-day reliance upon IT.

### Questions to ask:

- What is the software deployment model?
  - Does it meet the organization's specific security needs?
- What does implementation look like?
- What is the provider's approach to upgrades and updates?
- What are the software's scalability and performance capabilities?





**Finance:** They'll often need to develop a cost-benefit analysis that compares the costs of the new software with the benefits it provides. Vendors need to highlight potential return on investment and how it aligns with the organization's financial goals and objectives.

**Questions to ask:**

- What are the expected costs of the software, including licensing fees, implementation costs, training costs, and ongoing maintenance and support costs?
- How does it align with the organization's financial goals and objectives?
- How will switching impact the organization's budget, and how will it be financed?
- What is the improved potential return on investment, and how long will it take to achieve a positive ROI?



**Executives and Leaders:** Executives care about how software can improve the employee experience and support the organization's commitment to its workforce. Work to identify the business goals the new software can help achieve, like improving employee engagement, reducing HR costs, or enhancing compliance.

**Questions to ask:**

- How will the software support the organization's strategic goals?
- What are the analytics and reporting capabilities?
  - Does it provide insights in addition to the data?
- What level of scalability does the software offer?
  - Can it help with right-sizing operations?
- How easy is the software for employees to use?
- How is the new provider different from the previous provider?



# Time to Compare: What to Consider

Understanding the foundational capabilities of HR and payroll solutions is the first step in switching to the best provider. The most effective solution will have both the technical capabilities HR needs and the employee experience features that appeal to the entire workforce.

Beyond the typical payroll and HR software functions, employees want to feel heard and to have a voice – to co-create their experiences alongside HR and leadership. Transparency, communication, and connection to the organization and to their peers is important to them. And it benefits employers, who see increased engagement and collaboration when employees build connections.

## Core Features



**Human  
Resources**



**Payroll**



**Benefits  
Administration**



**Time &  
Attendance**



**Recruiting &  
Onboarding**



**Insights &  
Reporting**



**Compliance**





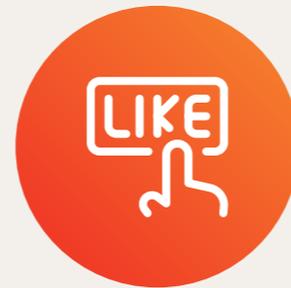
## Beyond the Basics

Once you verify a provider has the core features down, start looking for single, intuitive platforms. All-in-one solutions reduce repetitive administrative burdens, powering your organization to make strategic decisions, increase employee engagement, and prepare your business for the new future of work.

The most impactful all-in-one solutions offer features catering to the employee experience, like:



**Social collaboration tools**



**Peer recognition capabilities**



**Continued learning opportunities**



**Custom employee surveys**

A true all-in-one solution offers robust integrations so you can connect to other business-critical systems.

Employee experience features are designed to improve engagement, which impacts productivity and retention.

Engaged workers are

**57%** more effective

and

**87%** more likely to stay with your company

(Deloitte)

<sup>1</sup> <https://www2.deloitte.com/content/dam/Deloitte/us/Documents/human-capital/us-cons-engaging-the-workforce.pdf>

Here are a few specific factors to keep in mind when switching providers:

### Product Innovation

Look for solutions that evolve at a pace that keeps you competitive amidst changing customer needs and compliant amidst regulatory changes.

**Tip:** A solution that takes into consideration client feedback, identifies industry trends, and stays on top of legislative updates will ultimately help you work smarter.

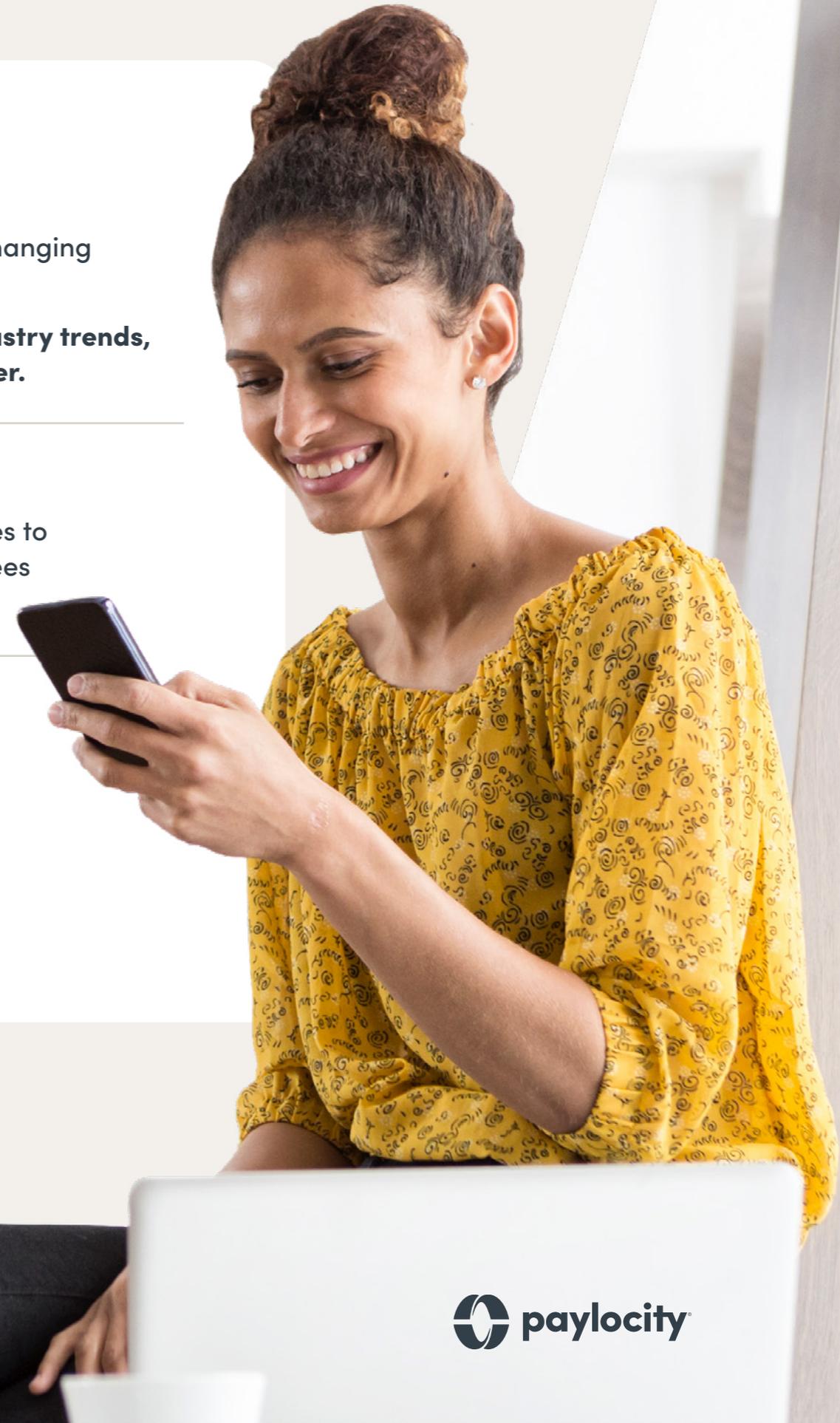
### Mobile-First

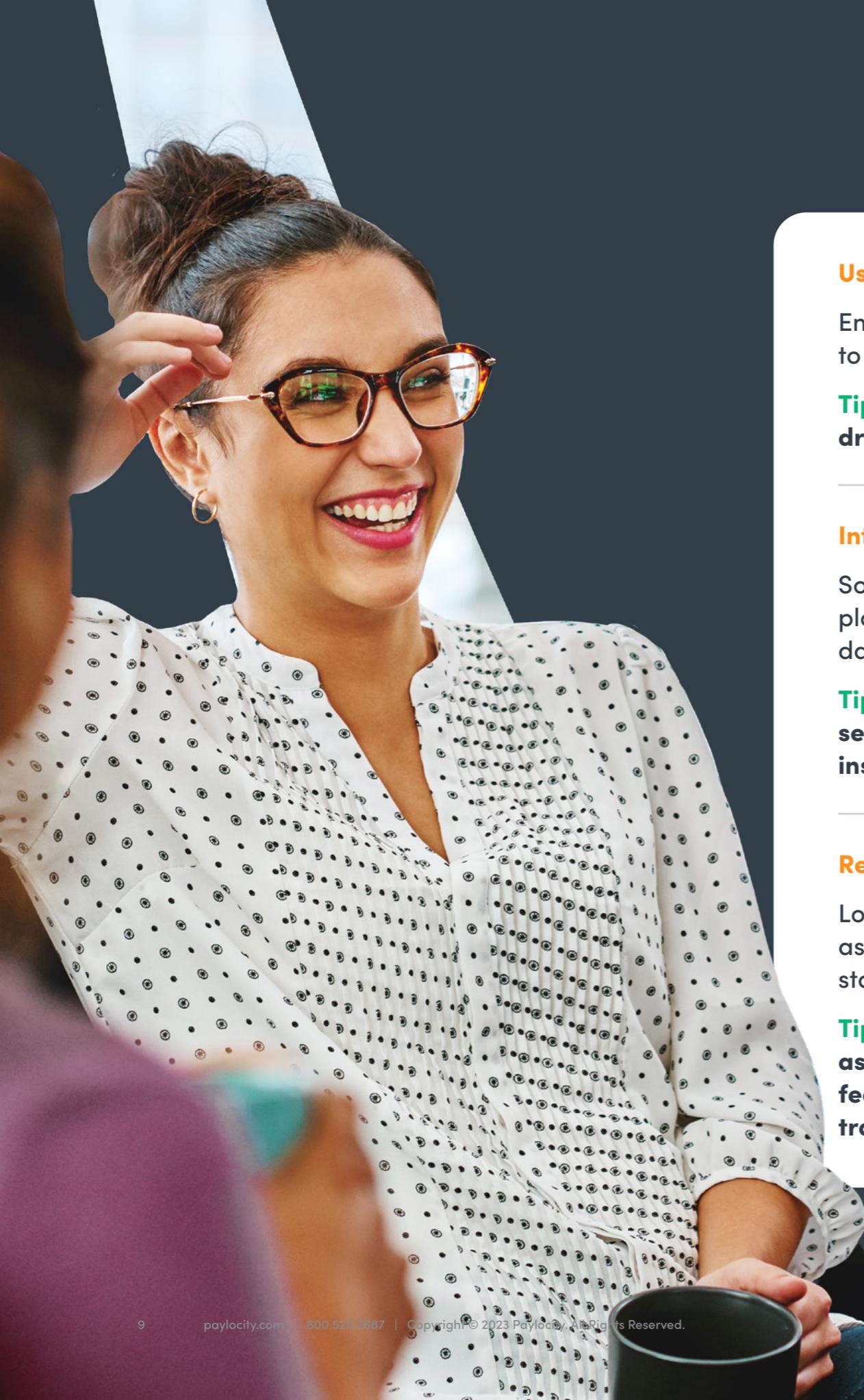
It's critical organizations are equipped with tools, technology, and capabilities to meet workers where they are: on their smartphones. Tools that help employees stay connected from anywhere maximize engagement and efficiency.

### Employee Engagement

Help your employees stay connected and informed. Empower them to collaborate and communicate with one another and the organization.

**Tip:** A solution that offers multiple ways to connect employees (like a social collaboration hub, file sharing, chat, and more) can eliminate the need for company-wide emails or break room flyers.





### Usability

Employ tools that provide ease of use and an elevated experience akin to what employees are used to interacting with as consumers.

**Tip:** A user-friendly solution will encourage employees to log in and drive self-service, ultimately taking some of the burden off HR.

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### Integration Capabilities

Solutions with an open architecture let you leverage other business platforms you have in place without the hassle of disparate and siloed data, time-consuming management, or a poor user experience.

**Tip:** The fastest path to ROI is by enabling data to flow seamlessly with your existing tools to provide holistic insight and power strategic decisions.

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### Regulatory Compliance

Look for solutions and providers that give you the benefit of expertise as well as flexible and proactive features that keep up with federal and state compliance.

**Tip:** A solution with the ability to adjust quickly and report accurately as regulations change will help you stay in compliance, avoiding fees and related consequences. Look for out-of-the-box compliance trainings for additional context and learning.



## What to Look for in a Provider

Don't miss the chance to evaluate the company behind the software.

In addition to the array of solutions, consider the providers as you make your choice. Providers that offer a partnership — not just a product — will go beyond implementation to walk alongside you as your needs and goals evolve over time. They take the time to deeply understand your unique business and help you make the most of your investment by advising and guiding you on much more than your daily “to-do” list.

### Ask providers about the following:

- 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

**Tip:** Don't take the provider's word for it. Sites like G2 compile reviews from verified users and can offer detailed insights into client experiences with the software.



# How to Get Stakeholder Buy-In

To get across the finish line, the entire buying committee must reach a consensus. Therefore, it's important to communicate the value of the new software and the specific ways it will improve processes across the organization.

As you work on getting buy-in from stakeholders, prepare to speak to the benefits that impact those individuals directly. Make sure you reference your needs analysis and the specific priorities of each member of the buying committee when you're presenting the option you've selected.



Don't skip a step.

Our Provider Switch Checklist will keep you organized throughout the process.

**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.

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- Easy access to custom reports
- Easily process end-of-year tax statements
- Facilitate cultural connection

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Switching providers isn't without its challenges, but the best solution will seamlessly fit into your organization's ecosystem — so you never have to switch again.



# How Paylocity Can Help

Any role within an organization comes with its own unique pain points you're looking to solve. That's why, here at Paylocity, we regularly collect feedback from our clients and design features for all employees — no matter the department in which they sit.

## Here's a quick look at some of the pain points Paylocity addresses:

### ✓ **Implementation**

- Easy guided implementation

### ✓ **Service**

- Award-winning customer service
- Phone calls answered in 20 seconds or less

### ✓ **Compliance**

- Consolidated compliance dashboard
- Compliance trainings, such as tax and ACA compliance

### ✓ **Training and Development**

- Learning (LMS)

### ✓ **Data Visibility**

- AI-powered HR analytics dashboard
- Employee engagement scores

### ✓ **Communication**

- File sharing and chat
- Improved collaboration

### ✓ **Employee Engagement**

- Social collaboration hub
- Peer recognition tools

### ✓ **Performance Management**

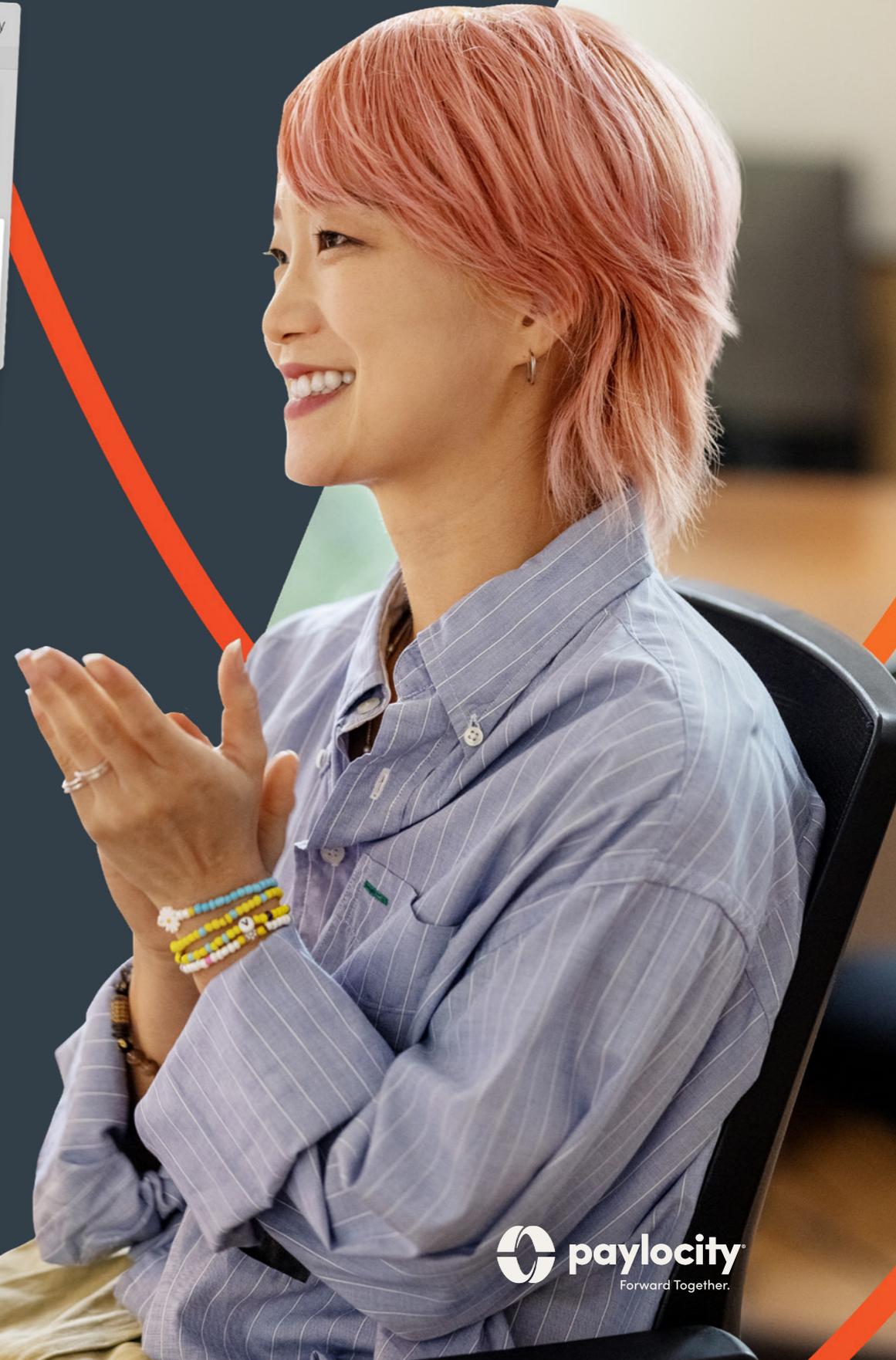
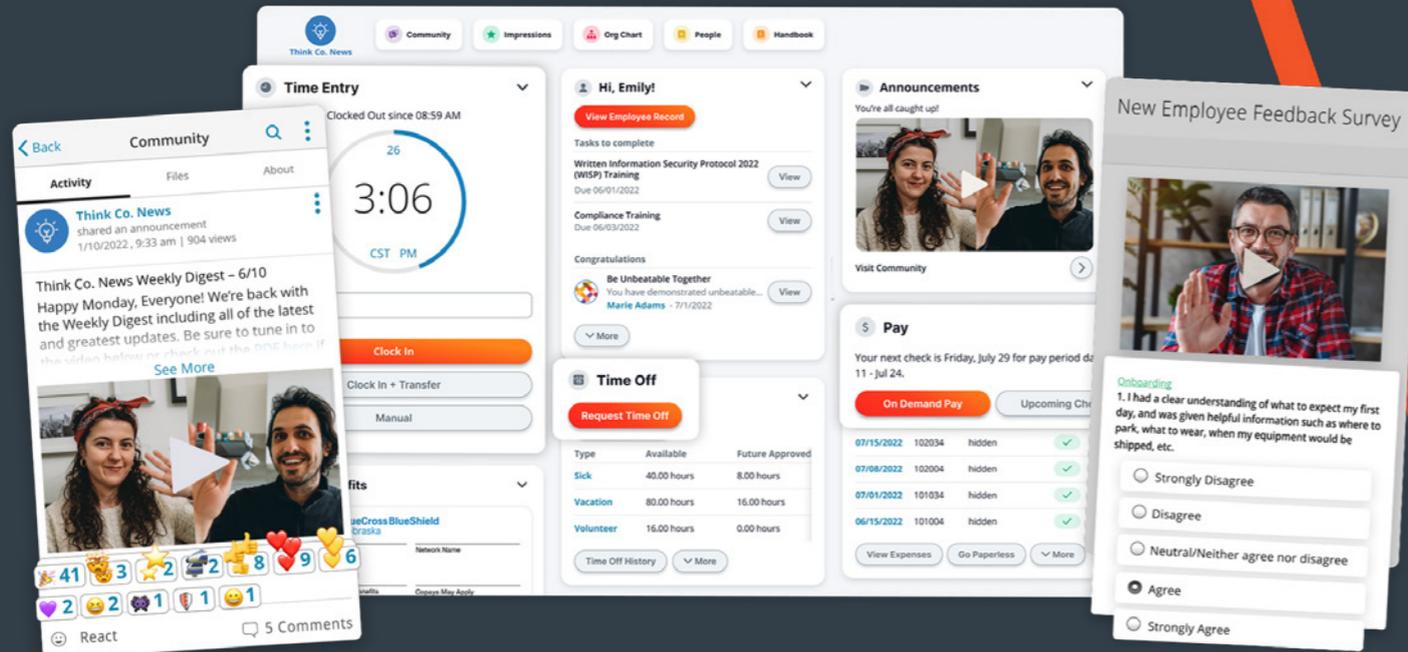
- True 360 feedback

### ✓ **Time-Consuming Processes**

- Payroll automation
- Simplified benefits administration

### ✓ **Recruitment and Retention**

- Streamlined recruiting
- Efficient onboarding
- Employee connection tools



## Your All-in-One HR and Payroll Solution.

To succeed and stay competitive in today's work environment, you need to stay on top of changing employee expectations as you do with your customers. As a leading provider of cloud-based HR and payroll software solutions, Paylocity can help your business make strategic decisions in the areas of benefits, core HR, payroll, talent, and workforce management, while improving employee engagement and making your organization an even better place to work.

Our comprehensive product suite delivers a unified platform, and our client-first service approach means we are a partner and advocate for your success.

Get a guided tour of our solutions.

**Request a demo to see how.** [→](#)