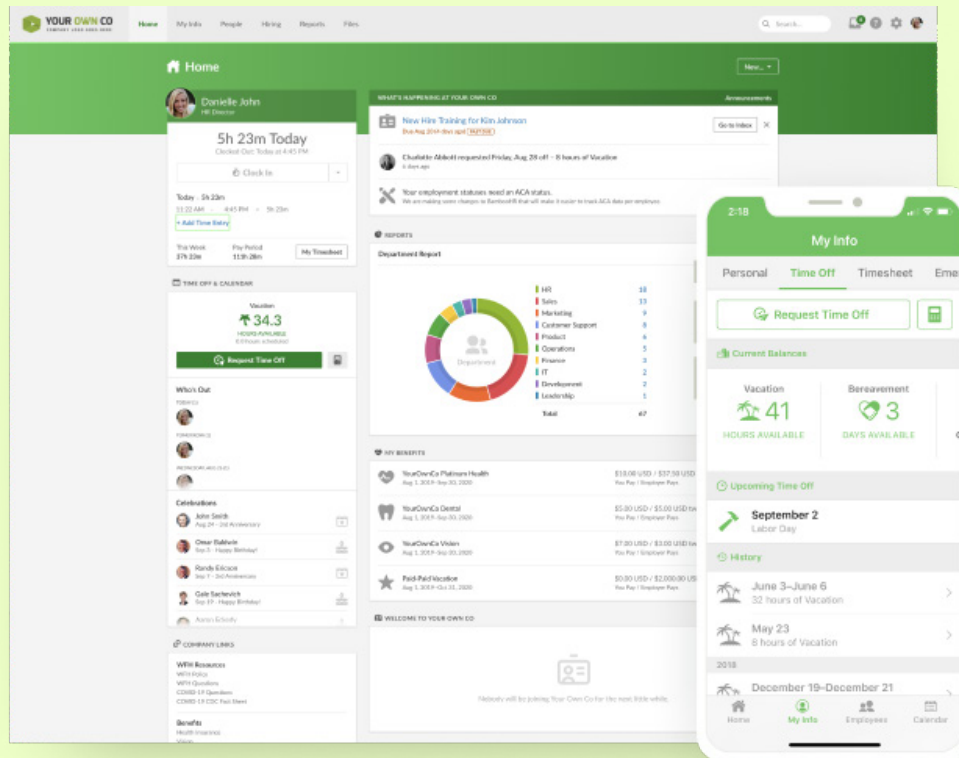


# *The Complete HRIS Buyer's Guide*

This guide provides a comprehensive overview of all-in-one human resources information systems (HRIS) and the steps involved in choosing the right HRIS for your organization.



## What Is All-in-One HR Software?

An all-in-one HRIS is designed to handle the A to Z of HR—employee records, payroll, performance, time tracking, benefits, hiring, onboarding, and so on. Ideally, all-in-one HR software allows you to rely on one software instead of a combination of systems.

As you look through the different steps in this guide, consider how your choice of all-in-one HR software affects more than just HR. With the right tools and features, an all-in-one HRIS helps you provide invaluable support to your employees and your organization, helping everyone do great work.

# Table of Contents

## **Step 1: Purpose**

Why Buy an All-in-One HRIS?

## **Step 2: Needs**

How Does an All-in-One HRIS Affect Employees?

## **Step 3: Research**

What Features Matter Most in an All-in-One HRIS?

## **Step 4: Shop**

What Should You Do Before You Buy?

## **Step 5: Plan**

How Do You Get Purchase Approval for Your New All-in-One HRIS?

## **Step 6: Implement**

How Can You Smoothly Integrate and Roll Out Your New All-in-One HRIS?

## **Step 7: Enjoy**

How Can You Make the Most of Your All-in-One HRIS?

01

## *Why Buy an All-in-One HRIS?*

When companies go on the hunt for new HR software, the [most common problems with their current system](#) generally point right to an all-in-one HRIS as the solution.

### **Top Three Failings of Companies' Current HR System**

50% Lack of features



25% Too manual



21% Not centralized



These frustrations likely feel very familiar, whether you've been using paper files, spreadsheets, various HR apps, or some combination of the three. But the right HR software can help you keep up with your company's HR demands, give you the time and tools to focus on your people, and prepare for future growth.

And that's where an all-in-one HRIS makes a difference.

### **What Are the Benefits of All-in-One HR Software?**

**Simplicity:** An all-in-one-HRIS eliminates a lot of administrative tasks and streamlines your process, giving you greater speed through automation and additional convenience through centralized digital storage for documents and data.

**More time to help your people:** Since you're able to step back from manual administrative work, you can spend more time improving the employee experience and maximizing your impact on business success.

**A better employee experience:** HR makes the heaviest use of an HRIS, but employees also interact with HR software whenever they clock in and out, check their pay stubs, manage their benefits, request information for taxes or loans, etc. With all-in-one HR software, employees only have to deal with a single, consistent system, login, and interface.

**The potential to grow with you:** An all-in-one solution can feel overwhelming; what if you don't immediately need every single feature offered? While it might feel safer to pick up single-feature software as new needs arise, you're limiting yourself to reacting to organizational change rather than planning for and driving that change.

**A central, digital database:** Transferring data between different HR software, spreadsheets, or paper files increases the risk of errors and discrepancies in your records. All-in-one HR software eliminates the need for multiple systems and paper files, making it much easier to keep data accurate, control access, and compile reports.

## ***Preparing for Change: The Future of Work and Shifting Employee Expectations***

Other than benefiting companies in a practical, day-to-day sense, an all-in-one HRIS helps you stay ahead of shifting employment trends, understand your employees' needs, and even deal with extraordinary circumstances.

The most recent example of an extraordinary circumstance drastically altering the needs of the global workforce and the work of HR is the COVID-19 pandemic. The pandemic has created massive changes in how people work and what they expect from employers. How well could your current HR system handle such a crisis? Would it help or hinder your efforts to support your business and your employees?

Responding to a crisis without proper tools is like trying to put out fires with your hands tied behind your back. A weak HR system limits you to what it can handle and leaves you at the mercy of guesswork, unable to measure or even see performance, culture, and employer brand issues, all of which can end up making good people want to leave.

### ***What are some new employee expectations following the pandemic?***

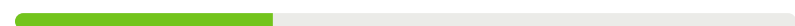
56% Flexibility with work hours



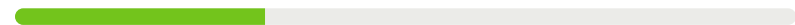
51% Remote work opportunities



33% Added benefits (i.e., paid internet and cell phone)



32% Expanded wellness/sick time

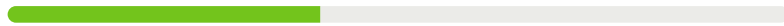


27% More empathy for underrepresented groups

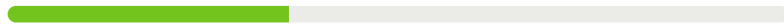


## **Why workers are leaving employers or switching careers in 2021:**

40% I've felt "stuck" in my current job



36% I'm burned out



31% Lack of promotion



29% Personal reasons



26% I lost respect for my company over how they treated employees over the past year



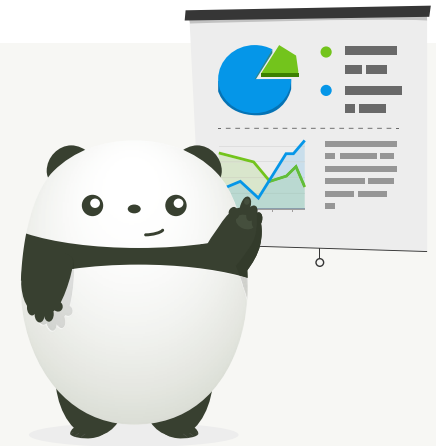
Companies need to be able to address employee concerns and pivot quickly to meet whatever challenges are sure to come, whether in the workplace or beyond. HR plays a frontline role in making employees feel like their employer cares about them enough to listen and help them find solutions.

Whatever your current HR system is, if it's not going to help you do that, then it's not the right system.

### **The Story Behind The Numbers**

In April 2021, BambooHR surveyed 1000 U.S.-based employees to discover how remote work and the events of 2020 impacted their careers, wellbeing, and plans for the future.

***Covid-19 & Careers: The Effect of the Pandemic on Career Progression***

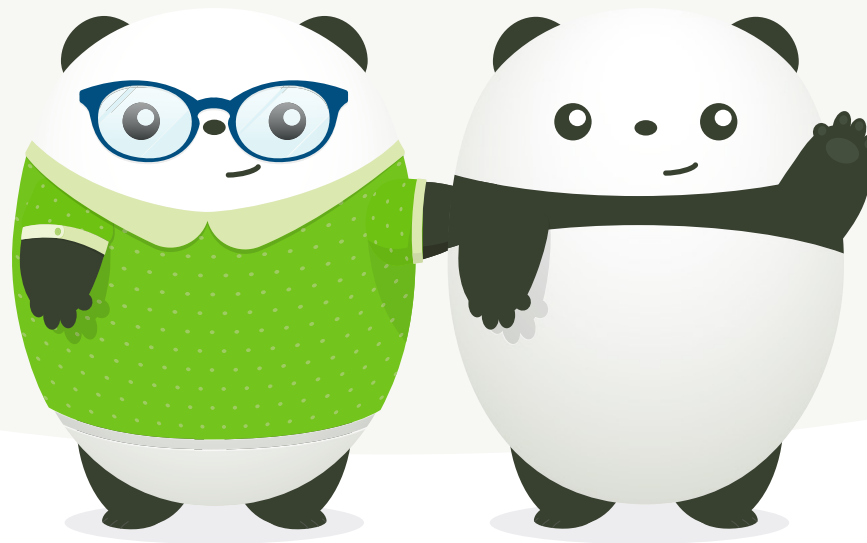


### **General Principles for Finding the Right HRIS**

With today's changing workforce dynamics, HR clearly plays a vital role in helping companies adapt, recover, and rebound, and that means finding an all-in-one HRIS that both automates and elevates transactional HR tasks, so they provide the most business value and support strategic initiatives.

When empowered to behave strategically, HR acts as the company's internal compass, helping to:

- Create transparency and accountability from the company's leadership
- Align employees with the company's values and goals





**Step 1 Checklist:**

# ***Understanding Your Needs***

Create your buying criteria for an all-in-one HRIS that will be a long term, comprehensive solution. Make a list of the following:

## ***Immediate HR problems***

Examples:

*Reducing time-to-hire*

*Organizing employee records*

## ***Projected challenges for the next one to five years***

Examples:

*Creating an effective onboarding process*

*Improving the candidate experience*

## ***Overall company goals***

Examples:

*Building a positive employer brand*

*Increasing employee satisfaction*

02

# Needs

How Does an All-in-One HRIS Affect Employees?

As we previously mentioned, an all-in-one HRIS will affect more than just HR, so you'll want to determine how employees at different levels of the organization will use the software and what they'll need from it.

And while not everyone will have the same needs, your overall goal with the purchase of new HR software should be to improve your employees' experience. Even something as "behind-the-scenes" as HR software plays a big part in improving (or damaging) your employees' experience, all of which has a ripple effect on the rest of the business.

### ***A Good Employee Experience Is Good Business***

While closely tied to employee satisfaction and engagement, the employee experience isn't limited to how employees feel at work. Employee experience encompasses all the interactions employees have with their workplace and employer. Working to make every touchpoint a positive one doesn't just make your employees happy to come to work, though that's certainly part of it—you're also improving how your company performs overall.

In research by Harvard Business Review Analytic Services (HBRAS), companies who prioritize employee experience have higher profitability, resilience, and growth. Gallup has similar findings when it comes to employee engagement, which "correlates strongly with positive performance outcomes," including:

- Profitability
- Productivity
- Sales
- Safety
- Retention

So taking into consideration how employees will interact with new HR software isn't just about common courtesies. You're ensuring that your choice will benefit your people and the business (as well as HR).

**Step 2 Checklist:**

# Different Employee Levels and Their Needs

Create your buying criteria for an all-in-one HRIS that will be a long term, comprehensive solution. Make a list of the following:

## **Executives and business owners**

### *Potential Needs from an HRIS*

- Data analysis and reporting for business oversight, planning, compliance, and operations
- Company performance
- Team or department performance

## **Managers and supervisors**

### *Potential Needs from an HRIS*

- Personnel data, e.g., performance, compensation, hours worked, PTO, contact info
- Hiring and onboarding information, e.g., *candidate resumes, interview notes, new hire training*
- Workflows, e.g., timesheet approvals, review cycles, promotions, transfers
- Document storage and signatures, e.g., I-9, company handbook, announcements

## **Individual contributors**

### *Potential Needs from an HRIS*

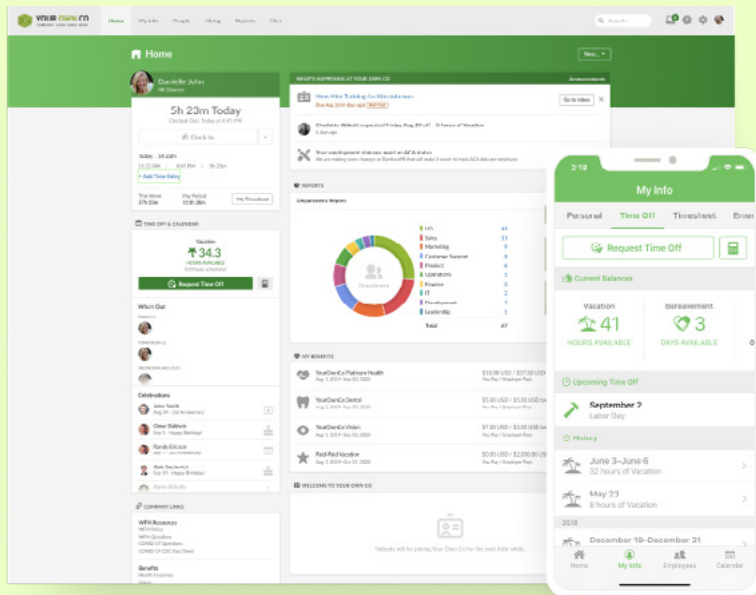
- Personal information, e.g., compensation, contact info, job history
- Benefits information, e.g., specific benefits, individual contributions, employer contributions
- Time management, e.g., time clock, hours worked, project tracking, PTO
- Performance, e.g., goals, reviews, manager feedback
- Document storage and signatures, e.g., I-9, company handbook, announcements

# 03

## **Research:** ***What Features Matter Most in an All-in-One HRIS?***

As you review HRIS options and each vendor makes the case for their software package, you'll see many features listed. This may leave you wondering what actually matters most in an HRIS.

This section walks you through the core functions of an all-in-one HRIS and how each can be useful to your organization.



## Centralized Records and Data Storage

Keeping information centralized is the core functionality of any good HRIS. It's the trunk of the tree—the central hub for all the interactions people need from HR. And like a well-pruned tree, an efficient HRIS should have a clear path from the trunk to the tips of its limbs. In other words, it should provide an intuitive experience for employees, managers, and leadership as they pull and update the information they need.

## Security and Permissions

Due to the sensitive nature of employee data and the obligation to comply with labor laws, an HRIS needs to be secure. Employees, managers, and decision-makers must be able to access everything they need and nothing they shouldn't, which means an effective HRIS needs to skillfully balance access with security.

## Employee Self-Service

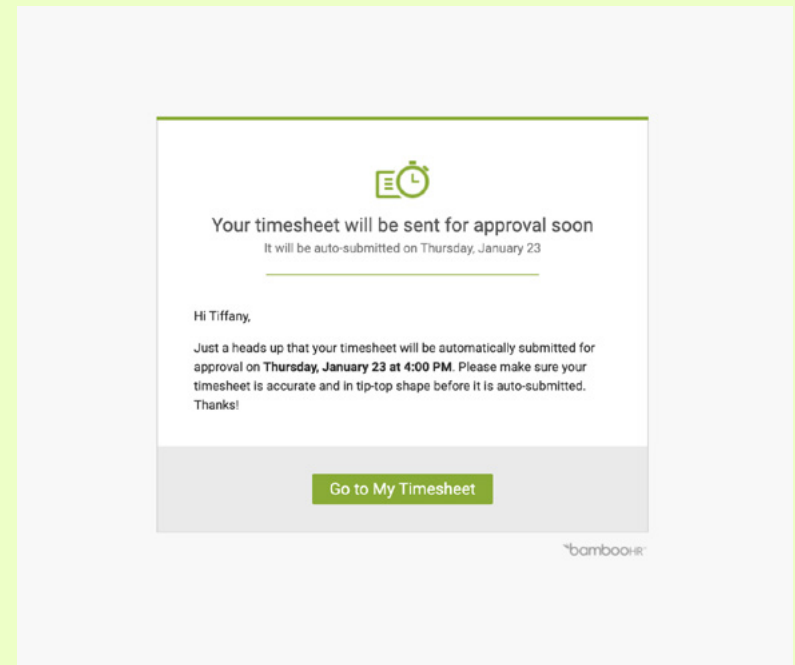
With sensitive information protected and an easily accessible central data hub, a world of possibilities opens up for employees and managers to handle their own HR needs. For example, when employees can update their personal information without a three-step change request form and manage their own PTO requests and balances, and when managers can review and approve timesheets on the fly, you can potentially save hundreds of hours across your organization every year.

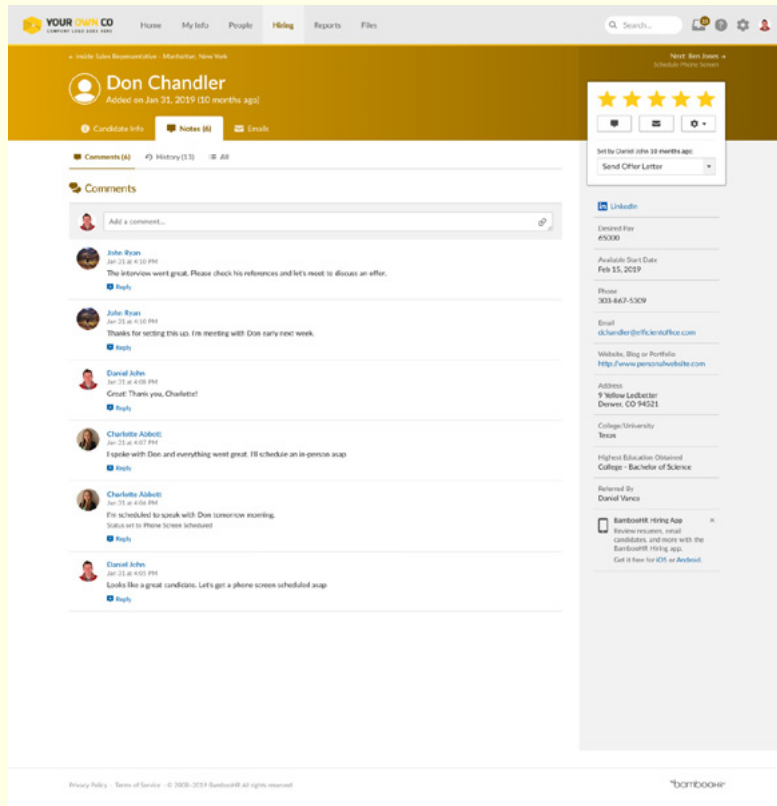
## **Alerts and Notifications**

Ensuring the flow of communication between the company and employees is key to running a productive HR department. Whether asking employees to complete a transaction or encouraging them to participate in the latest culture initiative, messaging needs to come across as easy-to-process and valuable for employees to engage in a timely way. With built-in alerts, direct-to-inbox notifications, and mobile access, HR and managers can easily get in touch with employees as often as they need to collect operational information like signatures, performance reviews, time requests, updated tax data, and more.

## **Compliance**

The combination of accurate data and collaborative communication is essential for meeting compliance needs. To ensure compliance, HR needs to know the data they're providing is accurate, up to date, and complete. And when other employees need to participate as part of the compliance timeline, notifications make it easier for employees to comply and for managers to remind them. It's a redundancy: when everyone is reminded about compliance deadlines, you eliminate bottlenecks, so the message gets through and things get done in a timely manner.





## Applicant Tracking System (ATS)

Modern job candidates want to know that your organization operates at a modern speed and their first impression of your competence comes during the hiring process. An HRIS supplies the complete framework for this process, helping you sift and organize applicants, streamline communication, and smoothly funnel the best candidates through to the onboarding process. A good HRIS also makes it easy for recruiters to collaborate with hiring managers, keeping the hiring process efficient and effective and allowing HR to engage more intentionally in equitable hiring initiatives.

## Performance

Managing employee performance is another area where an HRIS can help people collaborate and grow. Instead of a lengthy year-end review, brief periodic assessments help provide transparency for managers and leaders to know what's best for the employee and for the organization. When entering feedback and assessments is as easy as responding to a notification, performance goes from a burdensome formality to a real avenue for career development for your employees.

## Payroll

Payroll underpins your organization's success—not just through compliance with labor laws, but also in retaining your employees. An effective HRIS will sync seamlessly with payroll software to remove the danger of human error due to manually entering information. Past payroll systems often added HRIS as an afterthought, but now the trend is moving toward adopting an all-in-one solution: HRIS, payroll, and other needs managed in a single software ecosystem.



## Time Tracking

For organizations with hourly employees, a time tracking system is an essential extension of the payroll process. Along with looking for effortless sync with your HRIS and payroll systems, it's essential to know how many categories of hours you're dealing with. Your time tracking system may need to separate hours by project or client, and your industry may benefit from mobile clock-in capabilities.

## Employee Satisfaction and Engagement

HR shouldn't be the sole owner of company culture or employer brand, but you're often tasked with spearheading and assessing the success of both. Consequently, an all-in-one HRIS should help you listen to employees and understand the challenges they're facing. Handling satisfaction surveys with technological help makes it possible to provide employees with the anonymity they need to be comfortable giving honest feedback while keeping the analytic data to help leadership course correct your culture.

## Reporting

While an HRIS is a repository of information, that information does no good unless it's served to the right people in a form they can understand and use. Reporting features in an HRIS can save HR and leadership time in analyzing data, whether they're assessing turnover, taking stock of their hiring, reviewing PTO use while considering benefit changes, or seeing how decisions affect employee satisfaction and engagement in the long term.

Name	Manager	Regular	Overtime	Holiday PTO	PTO	Total	Approved
Aaron Eckerly		--	--	8.00	--	8.00	✓
Cheryl Barnett	Toni Walsh	--	--	8.00	--	8.00	
Dalton Christensen	Phyllis Wagnier	--	--	--	--	0.00	
Darlene Handley	Tiffany Vincent	--	--	8.00	--	8.00	✓
Dwight Goodman	Jennifer Caldwell	--	--	8.00	--	8.00	
Jasmine Oliveira	Cheryl Barnett	--	--	8.00	--	8.00	
John Smith	Tiffany Vincent	--	--	8.00	--	8.00	✓
Michael Jansel	Ryota Sato	80.00	80.00 (1.5x) 176.00 (2x)	8.00	--	244.00	✓
Nat Adams	Ana Delgado	--	--	8.00	--	8.00	✓
Omar Baldwin		--	--	--	--	0.00	✓
Paige Hanson	Gale Sachewich	--	--	8.00	--	8.00	
Shelly Cluff	Eric Posture	--	--	8.00	--	8.00	
Susan Roberts	Tammy Clayton	--	--	--	--	0.00	

**Step 3 Checklist:**

# Key HRIS Features

Create your buying criteria for an all-in-one HRIS that will be a long term, comprehensive solution. Make a list of the following:

Key HRIS Feature	
Alerts and notifications	<input type="checkbox"/>
Applicant Tracking System (ATS)	<input type="checkbox"/>
Centralized records and data storage	<input type="checkbox"/>
Compliance	<input type="checkbox"/>
Employee satisfaction and engagement	<input type="checkbox"/>
Employee self-service	<input type="checkbox"/>
Payroll	<input type="checkbox"/>
Performance management	<input type="checkbox"/>
Reporting	<input type="checkbox"/>
Security and permissions	<input type="checkbox"/>
Time tracking	<input type="checkbox"/>

# 04

## **Shop:** **What Should You Do Before You Buy?**

### ***Try It Before You Buy It***

The best way to find out if an HRIS has the right features and is going to make it easier for you to do your job is to try it out with a free trial account, sometimes called a demo account (these trial or demo accounts should be free to set-up and use; it's a red flag if they're not). With a trial, you can go into the product and try the features yourself rather than relying on a vendor's website or a sales representative's say-so.

### **Live Demos: Another Way to See an HRIS Up Close**

If you don't have time to try every HRIS you're interested in, you can request a live demo. Just know that the sales representative will be showing you an idealized version of the product, so you'll want to come armed with specific questions about:

- The product's ability to handle problems you're currently facing
- Features you need or want
- What you might need in the future

### **What Else Should You Do When Shopping for HR Software?**

#### **Read Customer Reviews**

It's easy for a sales rep to brag about their software, but you should look at what people who don't get a commission have to say. Third-party review sites will give you the most objective customer reviews.

*Here are few reputable software review sites:*

[G2](#)

[Capterra](#)

[GetApp](#)

[PCMag](#) (though not a third-party review site, this publication reviews business software)

#### **Try Out or Ask to See a Workflow (Rather Than Just a Feature)**

Before you do a trial or attend a demo, identify your most common workflows, then see how long it takes you (or the sales rep) to complete these workflows. Since you'll be doing these workflows over and over again, you want to make sure they're not cumbersome or time-consuming in the HRIS.

#### **Get a Price Quote**

Since part of the purchasing process will likely involve leadership's approval, you'll want to know what a new HRIS is going to cost for your organization. Be sure to ask about pricing, especially as you begin to compare different vendors and feature packages.

Here are the most common ways HR software vendors charge for their services:

- Per employee, per month
- Per user, per month
- Per employee, per year
- Once-yearly payment
- Additional fees for add-on features

***Listen for “We Don’t Do That.”***

It might seem like a bad sign if a sales rep admits to the limitations of their all-in-one HRIS, but no system is going to be perfect or able to seamlessly handle every use case. Maybe the HRIS has all the right features but not every feature is equally robust, and that’s something you want to know up front. A sales rep who says their software can do everything equally well isn’t being forthright.

***Ask About Customer Support***

Before you’re a customer, vendors have a tendency to roll out the red carpet, immediately responding to your every need. But how will they treat you once you’re a paying customer?

*Here’s what you need to find out about a vendor’s customer service before you buy:*

- What types of support are available: phone, chat, email, or some combination of these?
- Will customer support be available during your business hours?
- How have past and current customers rated and reviewed the vendor’s customer support?
- How will the implementation process go? How long does it typically take, and what kind of help do they offer their customers? Do you have to pay an additional fee for it?

### ***Find out about Customer Education Resources***

Customer support should go beyond being able to get someone on the phone. Look for an HRIS that offers a variety of ways for you to quickly find answers about the software and refine your HR skills that don't always involve contacting the customer service team.

*Some other ways for you to get help and learn more about features are:*

- Free product webinars
- Free learning/training courses
- Help articles
- How-to videos
- Newsletters
- Blog posts

### ***Take a Close Look at the Company's Vision***

Vision and mission statements steer a company and shape the product it makes. If their mission is something you'll outgrow, then you'll outgrow the company. Make sure the software company cares about solving challenges that will matter to you tomorrow.



**Step 4 Checklist:**

# Your Shopping List

## Shopping List

*Sign up for free trials or get a guided demo.*

*During demos, ask about:*

*The product's ability to handle problems you're facing now*

*Features you need or want*

*What you might need in the future*

*Watch out for overly rosey sales pitches.*

*Read customer reviews.*

*See how well different HRIS handle your most common workflows.*

*Ask about pricing and feature packages.*

*Find out about the vendor's customer service and education resources.*

*Research the company's vision and mission.*

# 05

## **Plan:**

# *How Do You Get Purchase Approval for Your New All-in-One HRIS?*

Once you've decided on the HR software you'd like to purchase (or narrowed it down to your top choices), you'll want to make a plan for:

- Getting executive approval to purchase the software
- Implementing the software with the help of the vendor



Let's start with the first and biggest hurdle: making a convincing case for purchasing new HR software.

### ***Creating a Business Case for a New HRIS***

By following our guide to this point, you should have a list of evidence to add to your business case. Here are the different pieces of information you should have gathered so far.

<b><i>In This Guide</i></b>	<b><i>Checklists</i></b>	<b><i>Suggestions for What to Present to Executives</i></b>
<b><i>Step 1: Purpose of HRIS</i></b>	<ul style="list-style-type: none"><li>• <i>Current HR problems</i></li><li>• <i>Projected challenges for the next 1–5 years</i></li><li>• <i>Overall company goals</i></li></ul>	<b><i>How this new HRIS can help you address each of these areas</i></b>
<b><i>Step 2: Impact on Staff</i></b>	<b><i>Potential needs from HRIS for:</i></b> <ul style="list-style-type: none"><li>• <i>Executives and business owners</i></li><li>• <i>Managers and supervisors</i></li><li>• <i>Individual contributors</i></li></ul>	<b><i>How you have accounted for the needs of employees at each level of the company</i></b>

**Step 3:  
Key Features**

**Core HRIS functions:**

- *Centralized records and data storage*
- *Security and permissions*
- *Employee self-service*
- *Alerts and notifications*
- *Compliance*
- *Applicant Tracking System (ATS)*
- *Performance management*
- *Payroll*
- *Time tracking*
- *Reporting*
- *Employee satisfaction and engagement*

**Ties in with your checklist  
from Step 1. Use this to show:**

- *The features your top HRIS choices provide*
- *How these features will help you address items in the checklist*

**Step 4:  
Shopping List**

**Through a free trial or demo, determine  
which HRIS is best, including:**

- *How well it will handle current and future problems*
- *If it has all your must-have features*
- *How well it handles your most common workflows*
- *Its customer support offerings, including the implementation process*
- *The various pricing and feature package options*
- *If the company's vision and mission fits with your goals*

**Ties in with your checklist  
from Step 1 and 3. Use this as  
evidence for your top choices.**

### ***Who Will You Need to Convince?***

Depending on the size of your organization, you'll want to include evidence aimed at:

- Other HR team members
- Payroll or finance team
- IT managers
- Executive team members (i.e., CEO, CFO, etc.)

### ***How to Talk About Cost and Savings***

One of the biggest considerations when purchasing a new HRIS will be the cost, both in money and time. Change is hard, even when the current way of doing things needs improvement. If you're getting some pushback from decision makers, you can strengthen your case by showing them how much you'll save, not just in money but also in time (which you also translate to money because someone's getting paid to do that work). But that's not always a simple calculation.

To help you estimate the time and money savings for your specific company, think about where you're currently spending money and time. We've put together a list of potential costs for you to consider below, organized by different systems you may be using, which you can then compare to the cost of purchasing a new HRIS and the time you'll save using its functionality.

While not a comprehensive list, use it to get started, but feel free to add even more costs for your specific situation. And if you use a combination of systems—for example, paper files and spreadsheets—make sure you add up all the costs under each of the categories.

### **Current System**

#### **Paper files and documents**

### **Hardware and Software: Financial Costs**

- Paper
- Onsite or offsite file storage
- Printer and copy machines
- Filing and office supplies
- Protection from physical damage or security breaches

### **HR Activities: Costs in Time**

- Filing documents
- Photocopying and printing papers
- Filling out paperwork
- Getting paperwork filled out by employees and candidates
- Getting employee and candidate signatures
- Updating paperwork
- Finding misfiled or lost paperwork or files
- Pulling information for manager and employee requests
- Compiling information for reports
- Training new HR hires on paperwork and filing system

### **Current System**

#### **Spreadsheets**

### **Hardware and Software: Financial Costs**

- *Spreadsheet software (e.g., Microsoft Excel)*
- *Protection from security breaches*

### **HR Activities: Costs in Time**

- *Manually entering data*
- *Exporting or transferring data to and from other systems*
- *Configuring formulas*
- *Finding missing data*
- *Fixing data errors*
- *Pulling data for manager and employee requests*
- *Compiling and filtering data for reports*
- *Training new HR hires on data processing*

**Current System**

**Multiple HR software apps**

**Hardware and Software:  
Financial Costs**

- *Individual apps*
- *Protection from security breaches*

**HR Activities:  
Costs in Time**

- *Exporting or transferring data to and from other systems*
- *Pulling data for manager and employee requests*
- *Compiling and filtering data for reports*

### Extra Help



### ***Want to look at some potential savings before you start your own calculations?***

Based on labor and market data, we estimate a company could save \$94,250 annually by getting HR software.

### ***Don't Forget Strategic Benefits***

While each decision maker will have their own questions and concerns, remember to emphasize the strategic benefits of an all-in-one HRIS:

- By freeing themselves from paperwork, HR and managers can spend more time on supporting employees.
- By providing better tools, HR can contribute to a better employee experience, making for happy, engaged employees who are more productive, which in turn makes businesses more profitable.
- A comprehensive HRIS has the potential to grow with you, helping you anticipate future needs and handle shifts in employee expectations.
- A central, digital database makes you more secure and strategic.

# 06

## ***Implement***

# ***How Can You Smoothly Integrate and Roll Out Your New All-in-One HRIS?***

Assuming you've successfully presented your business case to the decision makers at your company and purchased a new HRIS, it's time to create a hard and fast deadline for the implementation of your brand-spanking new HR software.



## ***What Is Implementation?***

Implementation is what happens after you buy new software; it's the work of integrating the software into your company's processes and workflows.

To make sure your new all-in-one HRIS is running smoothly, you'll likely have to go through the following action items:

- Gather and format any new data you want to include
- Transfer employee data from your current systems to the new HRIS
- Digitize paper documents
- Set up employee access permissions
- Set up workflows and customize functionality
- Test the new HRIS before rolling it out to employees
- Train yourself on the new HRIS
- Train the HR team, leadership, managers, and employees
- Integrate third-party apps or services



## ***What Should You Consider When Creating Your Implementation Timeline?***

### ***Decision Makers And Other Relevant Departments***

Creating an effective implementation timeline will require collaborating with some of the same people and teams—e.g., executives, IT, payroll—involved in making the purchasing decision. Include specific dates for those key players and what you'll need from them to keep everyone accountable and the implementation process going smoothly.

### ***Implementation Timeline from the Vendor***

How long it takes to implement an HRIS depends on many factors:

- The number of employees you have
- How much data you'll need to migrate or digitize
- If you need to customize any functionality
- Your data security requirements

Your vendor should be able to evaluate your requirements and give you an estimated timeframe for implementation. Common timelines range from as little as seven weeks to a full year, depending on the vendor and their offerings.

### ***Resources from the Vendor***

You might have the option to do it all yourself with the help of set-up videos and guides, or the vendor might assign an implementation manager to help you through the process. Whatever the options, it should be clear how you can get help when you need it.

### ***Soft Launch to Company Management***

This gives you time to work out any kinks and build familiarity with the product throughout the company. You can smooth out the transition to the new software by getting leadership and management on board first and training them on how to use it and how to help their employees use it. This way, once you roll it out to the rest of the company, employees can go to their managers if they get stuck using the software rather than to you or IT.

# 07

## *Enjoy*

# *How Can You Make the Most of Your All-in-One HRIS?*

Congratulations! You're now the proud owner of a sparkling new all-in-one HRIS. You've done a lot of work to make this happen, so you should enjoy the fruits of your labor to the fullest extent. And that's going to mean adjusting how you work to make sure this new HRIS does what it's supposed to do—free you to spend more time supporting your people!

Here are a few final suggestions for making the most of your all-in-one HRIS.

### ***Get Friendly with HR Metrics and Data***

One of the biggest advantages of having a central data source is that you have everything at your fingertips. You may not have been able to dig into things like cost per hire, retention rate per manager, or employee satisfaction and engagement before, but now you should have a lot of data to play around with.

*For more information:*

[The Key HR Metrics You Should Be Measuring](#)

### ***Set a Cadence for Reviewing Your Data***

To avoid feeling overwhelmed by all this additional data, determine how often you're going to review it and what's a priority for your organization. For example, lower maintenance things like holiday scheduling might only need a look once a year, but employee satisfaction might warrant an in-depth review twice a year.

*For more guidance:*

[Ask an HR Expert: Connecting Data and Strategy](#)

### ***Embrace a Paperless World***

Take full advantage of the security advantages, cloud storage, and digital documentation capabilities of your HRIS by getting rid of any remaining paper forms, files, or processes. Company announcements? Send them through the HRIS. Employment contracts? Use e-signatures. Job postings? Use your ATS. You'll be making things much more secure and more organized.

*For ideas on going paperless:*

[How to Create a Paperless HR Department](#)

*For information on e-signatures:*

[Everything You Need to Know About E-Signatures](#)

*For information on the benefits of using an ATS:*

[5 Ways an ATS Can Improve Your Hiring Process](#)

### ***Take Advantage of Automated Features***

Remember all the time savings we said would come from getting an all-in-one-HRIS? Automation is a big part of making that happen. Consider automating things like:

- Notifications for employee requests to managers (e.g., time off and approvals)
- Notifications for hiring and onboarding events (e.g., when a new candidate applies for a job posting)
- Notifications for documentation and training requests (e.g., yearly anti-harassment training)
- Regular reports (e.g., a quarterly company performance report for leadership)

*For ideas on using automated features:*

[5 Processes Automated Recruitment Software Can Speed Up](#)

[8 Must-Have Benefits of Automated Payroll](#)

### ***Enable Employee Self-Service***

HR is in charge of keeping a lot of sensitive information safe, so it can feel scary to open some of that up to employees. But with the right permissions in place, you can give people more control and ownership over their information, which fosters greater transparency and trust. Plus, this helps spread some of your administrative workload.

*For example, managers with self-service access can take care of:*

- Timesheets
- Time-off requests
- Information changes
- Pay raises
- Promotions
- Interview notes
- Candidate ratings
- Performance reviews
- Team reports

*And employees can take care of things like:*

- Clocking in and out or entering their hours
- Checking their current PTO balance
- Calculating future PTO accrual
- Requesting time off
- Updating personal information

***Attend Vendor-Hosted Product Webinars, and Read Their Help Resources***

Hopefully, you'll be able to get up and running quickly with your new HR software, but as new features get released or new challenges arise, you'll want to keep an eye out for more customer training resources.

You've invested time and money in this HRIS, so lean on the resources your vendor produces, so you can stay on top of updates and learn how to best use your HRIS's features. Take advantage of training opportunities like:

- Customer webinars
- How-to videos
- Learning courses
- Product release emails
- Newsletters
- Customer case studies (sometimes, it's helpful to hear someone else's experience)
- Customer surveys (tell them what you think!)

***Now go do  
your best  
work!***

