

# Software

## Quick Reference Sheet

Here is your cheatsheet, as promised. This is for your reference as you search for the right Human Resources Software for your business.

Give yourself enough time to perform as much research as possible before you make the final decision.

This is just a quick guide which means there is more to this process, but this document will at least help you stay organized throughout your software journey.

*Thank you*



Hello, I'm **Yonica**, and I have served on numerous **software** conversion and implementation projects from small businesses to Fortune 500, non-profits and PEO. With 2 decades of **HR & HR Tech** experience, my mission is to **help you** find the right **software** without the confusion, by providing **resources** you can use.

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# General Idea

This is the phase where you will be collecting information from your teams who will have a better idea of what their needs are and what the existing software is capable of doing. These individuals should be department heads and subject matter experts.

- HR Manager
- Benefits Manager
- Payroll Manager
- Training Manager
- IT Manager





# General Idea

HR Manager

Benefits Manager

Payroll Manager

Training Manager

IT Manager

Current Software	Notes
What We Like About Our Current Software	
What We Are Missing From Our Current Software	
What are We Losing From Having The Current Software	
How Are We Currently Hosting	
New Software	Notes
What Are We Searching For? (Payroll, Benefits, HR?)	
What Would We Like the New System to Address	
What Are Our Must Haves	
Do We Need Customizations	
Can It Integrate with Our Existing Systems	
Will We Host On the Cloud / Inhouse / Hybrid	
Should Our Employees Have Access (ESS)	



**(HRIS)**  
**Human Resources Information System**

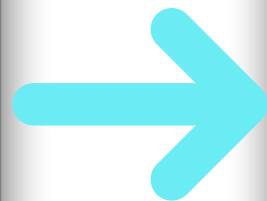
**(HRMS)**  
**Human Resources Management System**

**(HCM)**  
**Human Capital Management**



# HRIS

Benefits Administration  
Payroll  
Personnel Tracking  
Recruiting  
Reporting Capabilities  
Self Service  
Tax Compliance  
Time & Attendance



# HRMS

Performance  
Management  
Succession Planning



# HCM

Absence Management  
Applicant Tracking  
Budget Planning  
Onboarding  
Scheduling  
Training

**In Short:** Don't get confused with the acronyms. **Software** has evolved throughout time, and so have the **needs** of employees and organizations. **HRIS** is the oldest form and now most software products are categorized as **HCMs**, which focuses on the **employee experience** and managing employee data in a strategic way.



# Budget

*Consider how much you're currently spending and how much you're losing with keeping your current solution*

Rate per Unit

Software Cost	\$ _____
Licensing (per user, etc)	\$ _____
Subscription	\$ _____
Renewals (if any)	\$ _____
Implementation	\$ _____
Training Hours	\$ _____
Office Hours	\$ _____
Additional / Misc Costs	\$ _____
External Consultants	\$ _____
<b>Total</b>	\$ _____

\*Time

\*Resources

\*Clients



- What does the software look like?
- Do you envision the employees liking it?
- Is it easy to configure?
- Did you get your questions answered?
- Does it offer what you were searching for?
- Do they have a trial period?
- Customer reviews and testimonials
- Does the software serve / familiar with your industry
- Does the software serve your company size

*Make sure some  
one is **designated**  
to ask these  
**questions** during  
the call*

# Checklist

Department	Key Takeaways from the Demonstrations
HR	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>
Payroll	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>
Benefits	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>
Learning & Development	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>
IT	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>
Finance / Accounting	<ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li></ul>





## Semi-Finals

### **Reduce your list to 3 or 5 software vendors**

- Do they match your requirements?
- Are they within your budget
- Can you envision them as a longterm partner?
- Are they familiar with your industry?
- What could disqualify them?
- What did they miss?
- Is support and training included?
- Do they have a trial period?

*There may be a few features they may not have, but can you manage without those?*



**During this phase, you should have collected enough information from the teams, demos, software vendors and trialed the software in order to make a decision.**

**It's safe to move forward with your final cut.**

*If there are any unanswered questions, you will need to reach out to the vendor for clarification.*

# Final Cut Sheet

Department	Software Offers This	Doesn't Offer, But It Can Integrate
HR		
Payroll / Taxes		
Benefits Administration		
Learning & Development		
Recruiting / ATS		
Reporting & Analytics		
Performance Management		
Timekeeping / Attendance		
Onboarding		
Talent Management		
Additional Notes		



## Business Case

- \* What software does your company currently use?
- \* What are you losing by not having a new / modern system?
- \* Furnish feedback from the teams & stakeholder(s)?
- \* Include information from the demonstrations?
- \* Projected ROI (operational savings, overall financial gains)
- \* Project Plan (include teams, training, timeframe, stakeholders)

*To avoid receiving the word “NO”.  
Make sure you furnish enough information and the numbers your financial decision makers would like to see on this report.*