

checklist:

What to Know Before Buying HR and Payroll Solutions

When shopping for a new HR and payroll solution, asking the right questions helps you find the right choice for your business. That means a smoother implementation and a faster return on investment. Use this checklist with our buyer's guide to inform your decision-making process and conversations with potential providers.

Basic Functionality

Take some time to understand the basic capabilities of HR and payroll solutions to set your own expectations and consider how the various teams in your organization might use the platform.



Human Resources

Automates daily tasks and leverages key HR data to identify trends and enables strategic decision-making.



Payroll

Improves efficiency by simplifying core payroll processes, and empowers employees with flexibility and access to information and even earned wages.



Time & Attendance

Eliminates manual tracking and data entry while ensuring accuracy and compliance within a diverse workforce.



Collaboration & Communication

Gives employees a centralized place to connect and collaborate from anywhere, including ongoing feedback, peer recognition, and company news.



Benefits

Simplifies enrollment and enhances standard offerings with flexible benefit programs.



Talent Management

Enhances the employee experience by providing flexible learning options and enabling ongoing performance feedback.



Recruitment

Standardizes and enhances candidate and new hire experiences.



Data & Insights

Provides flexible access to historical and real-time data and analytics to monitor key metrics and identify trends and insights for strategic decision-making.



Identify Your Unique Needs

The right solution depends on your business's unique needs and goals today but can scale to meet your needs and goals of tomorrow. Before you even start comparing HR and payroll solutions, it's important to understand and agree on what those are and how they're prioritized.

- What's Your Organization's Size?**
How many employees do you have? Do you experience seasonal growth? How many locations do you operate? Do you have plans for growth that might impact your priorities for functionality and pricing?
- What Categories of Employees are Included in Your Workforce?**
Does your employee base include freelancers and non-exempt, hourly workers in addition to full-time staff? Consider the implications of the different types of workers you employ on how you track time, process payroll, and manage PTO and benefits.
- What are Your Compliance-Related Needs?**
Do you have to stay on top of compliance across multiple states? Does your industry have unique regulations?
- Will You Need to Support Remote Workers in the Field?**
Do you have employees who work remotely and need access to mobile-friendly solutions?
- What is Your Budget?**
Does your budget take into account potential add-on fees, like implementation, service, customizations, and maintenance? What are your priorities when considering cost?
- Do You Have Any Other Unique Needs Specific to Your Industry?**
What industry-specific considerations should you keep in mind, today as well as in the future?



Investigate Your Options

As you prepare to research and compare your options, ask questions about how they operate, how they integrate, and capabilities that uniquely match with your business needs.

- Integration Capabilities**
Look for solutions with an open architecture that let you leverage other business platforms you have in place without the hassle of disparate and siloed data, timeconsuming management, or a poor user experience.
- Mobile Capabilities**
Look for solutions built with mobile in mind.
- Usability**
Look for solutions with a high user adoption rate and ease of use.
- Engagement**
Look for solutions that offer employees the ability to collaborate and communicate with one another and the organization, as well as effective tracking of training, performance, and recognition within individual employee records.
- Regulatory Compliance**
Look for solutions built with mobile in mind.
- Innovation**
Look for solutions that continue to evolve and strategies in place to keep up with changing customer needs.

Evaluate the Providers

Pro Tip: Not all providers are created equal. Providers that offer a partnership (not just a product), go beyond implementation to walk alongside you as your needs and goals evolve over time.

- Experience**
Look for providers with extensive experience, including with companies in your industry and of your employee make-up and size, demonstrating familiarity and stability.
- Culture**
Look for providers who show they understand your people-focused goals and have achieved a positive, forward-thinking culture at their company.
- Adaptability**
Look for providers that have the ability to support your current and future needs.
- Implementation**
Look for solutions that provide flexibility during the implementation process by taking a client-focused approach and allowing configurable solutions.
- Customer Service**
Look for providers who offer a high level of service, quick response rates, and a history of resolving issues effectively, and research user reviews (e.g., G2 or other verified user review sites) to confirm their claims.
- Access To Support**
Look for providers with a variety of ways to access support so you can get the help you need when you need it.

Final Steps: Buy-In and Approval

Involving key stakeholders and decision makers early in the process will mean a faster, smoother approval process to get you into your new solution sooner. Give others the chance to voice their concerns and priorities, and prepare to translate the benefits of the platforms you're exploring to the various perspectives by considering the following:

- Current pain points and lost opportunity
- Potential savings of time, effort, and money
- Clear, detailed plan of action
- Connection to business goals

How We Can Help



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

Use this checklist with our buyer's guide, *Navigating the Buying Process for HR and Payroll Solutions*.

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