

JULY 2020

# SAMPLE QUESTIONS TO SUPPORT MODEL CREATION FOR PHASE I: PLANNING

# Current needs, opportunities and challenges:

To tackle this area, ask yourself some questions:

- *How much time are we losing passing paper around the firm?*
  - New Hire Paperwork?
  - Payroll updates such as W-4 or address changes?
  - Manually tracking education, certification, licenses, etc.?
  - Benefit enrollment and benefit administration including manual updates to carrier portals or 401k vendors?
  - Paper based Performance Review forms?
  - Spreadsheets to track all of the above?
- *How much time do we spend manually collecting and reporting on 'People' issues?*
  - Manual calculations of turnover?
  - State and federal required reporting?
  - Annual merit increases/bonuses/equity awards and fair pay analysis?
  - Hiring metrics such as time to fill, applicant to hire ratios?
  - Spreadsheets to track paid time off, leave of absences, overdue performance reviews, state mandated sick time, compliance training?
  - Manual filing into personnel files or sending scanned documents back and forth?
- *How much time is spent sending employees information because there is no repository for employees to access information that is important to them?*
  - Answering benefits questions?
  - Answering paid time off?
  - Employee handbook/policies?
  - Positive benefits such tuition reimbursement, wellness initiatives such as gym reimbursements, acupuncture discounts, etc
- *What is the message we're sending to our candidates (brand), new hires (excitement of interview vs. reality of work environment) and current employees (my firm cares about ME) with our manual processes and limited access to information?*
  - Is this the first impression and message(s) we want to send?
- *Where else are you losing time due to manual or cumbersome processes?*

# Future growth plan:

Looking into your crystal ball and identifying HRIS system needs is as important as assessing current state. Selecting an HRIS, then changing it 2-3 years later because it cannot support your growth is a headache and time suck that you should make every effort to avoid, so be thoughtful and intentional

To tackle this area, ask yourself the same questions listed above, but project out 2-3 years later based on your firm's strategic plan:

- *How will all of above scale and become more manual, time consuming, suboptimal message reinforcement, etc?*
- *Expansion and acquisition will lead us into multi-state or international employees?*
- *Will you have a service center or other operation that will significantly increase your hourly employee base, driving a need for overtime calculations and time and attendance tracking?*
- *What reporting do you have, do you want and will you need to enable business decisions or for compliance purposes?*
- *What modules are critical to add to the HRIS?*
  - *Onboarding to support robust, candidate focused hiring?*
  - *Training/Learning Management to support a culture of support for career growth?*
- *Employee focused communication and ease of access to information? Ability to post corporate communications easily and quickly?*
- *What else will be important as your firm grows, so your HRIS must be able to scale?*

# How ready is your organization to be more sophisticated in decision-making and talent planning?

- *Is your organization working to attract high value talent in a competitive labor market(s)?*
- *Are you grappling with turnover/retention issues for key roles?*
- *Is engaging people critical to meeting aggressive business goals?*
- *Are you striving to have a certain culture, and the behaviors that go with it?*
- *Do you spend time and thought on making the right investments in compensation, rewards and development, or let it happen by chance?*
- *Do you know who your promotable people are right now? And who isn't going to make it? And can you hold your people leaders accountable for keeping the former and dealing with the latter?*

# MUST HAVES

*These are your non-negotiables and system imperatives for your HRIS.*

- If your growth includes multi-state or international, select an HRIS and payroll module that automatically adjusts for wage and hour differences and offers 'push of the button' canned reports for state compliance.
- Integration issues. Are you planning to use one vendor? Or do you have a payroll system and ATS system that will need to integrate with the HRIS?
- Reporting. What data do you need? How robust are the canned reports and how easy is ad hoc reporting functionality? Some HRIS systems are not robust with ad hoc reports but will create any report you need for a fee!

# NICE TO HAVES

*These are the bells and whistles that would be great but you're willing to compromise if they aren't available or are too expensive.*

- A robust training and education module.
- On-line new hire paperwork and a basic ATS functionality.
- Communication and notification capabilities.
- Single point customer service support versus a call center model.
- Template dashboards and scorecards instead of just reporting functionality.

# WISH LIST

*These are the cool features that you've seen in other systems or the answer to 'it would be great if the system did this'. These feature(s) will often be the differentiator to help you choose your system from among your finalists.*

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- Reporting. What data do you need? How robust are the canned reports and how easy is ad hoc reporting functionality? Some HRIS systems are not robust with ad hoc reports but will create any report you need for a fee!