Getting to grips with new technology: A guide to best-practice HR software implementation

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Jo Faragher:

Hello. It's UNCLEAR here from PersonnelToday and welcome today to this PersonnelToday webinar, brought to you in association with Cascade.

Today we're looking at getting to grips with new technology, a guide to best-practice HR software implementation. You may be at the start of investing in a new HR software system, or perhaps you've chosen a supplier and want to know what comes next.

For any organisation investing in sophisticated software systems, the implementation stage can seem extremely daunting. Not only is it a major financial investment, you'll need to engage with many different stakeholders, from those at the very top of the organisation to the employees who will be using it.

Also, implementing a new HR system often brings with it a change management challenge and it's tough bringing everyone on board with the benefits of the new software. Chances are you'll only have one chance to get it right. So how can you ensure it's a success?

Over the next hour, our guest expert, Pritul Khagram, is going to discuss some strategies you can use when implementing a new HR system. He'll give you some practical advice on what to expect during the implementation stage and how you can ensure HR, the business and the employees are happy with the results.

Pritul is CEO and Founder of People Force International, an HR, recruitment and immigration consultancy, and he's a Fellow of the CIPD. He has considerable expertise in leading major HR system implementations and a deep knowledge of the HR tech sector. He has also served as an HR Director himself at SoftGen, where he implemented HR transformation projects, including a global rollout of an HR system.

So first up today in our webinar there will be a presentation from Pritul. This will take about 30-40 minutes. Then we'll jump into a Q&A. Do feel free to submit your questions at any time during the webinar in the chat pane on the left-hand side of your screen.

I should just let you know we're also going to ask a couple of poll questions during the presentation. You should be able to see voting options as we come to them, so do take part.

Also, the webinar is being recorded and will be available in the next few days on demand, as will the slides.

So now I'm going to hand over to Pritul to discuss some of the key issues you might face when implemented sophisticated HR system software. Over to you, Pritul.

Pritul Khagram: Thank you very much, Jo. Good afternoon to everybody and thank you for having me here.

So today we're going to talk about HR software implementation. I think it's very important to highlight right at the beginning that the methodology for implementing systems could vary depending on which system you select and the size of your organisation etc., and so the hints and tips I'm going to talk about today are more of a general nature, and I will be focusing more on the parts of the implementation that are more internal to your organisation, so in other words you and your HR team [audio cuts out – 0:03:25.9] roles you will play as part of an implementation.

So going onto the slides, some of the key things I think to keep in mind are to remember that an HR and payroll software implementation is a change programme. It will transform the way HR services employees. Things will get worse before they get better. It's a great opportunity to review all your current processes and almost rebuild them if you feel they were inadequate.

Implementation should normally be phased by either module or location. You have to know what your priorities are. Is payroll a complete pain for you currently and therefore do you need to get payroll rolled out as soon as possible? Can things like training and recruitment wait or is that something that should be high in the pecking order? Those types of things you need to sit down and kind of raise and prioritise.

You need to have a dedicated project team, and we'll talk about project teams shortly. And data integrity is absolutely important. So implementing a new system is a very good opportunity to clean up and tidy up all your data, which could be very disjointed in various different locations, Excel sheets, paper-based, HR drives etc.

And finally, what's very important to remember is that it is a business tool. It will become a business tool, not just an HR tool. It will help your business excel further and help management make certain decisions using accurate information that you are able to populate from your new system.

So moving onto the teams. I mentioned the implementation teams. So with any software implementation, what's important to note is that there will be a project team from your chosen provider of the system, and there should also be an internal project team as well, coordinating all internal activity. So from the provider's side you would typically have a project manager, you would typically have consultants that would be involved in training you and configuring the system. There may be some specialist consultants who have some expertise in specific areas such as payroll and reporting. There will be data consultants. These consultants would be responsible for migrating your data into the system. There will be support desk, and this is the team that will look after you going forward, but during the implementation you will be introduced to them and you may start to liaise with them on certain items. And then of course there's the account manager, so as soon as your project is live, typically you will have it over to an account manager who would be your go-to person in terms of on-going relationship maintaining and building, as you use the product.

So how is the internal team made up? You will typically have a project sponsor, so this is the person internally who has commissioned the whole project and that is typically the budget holder or typically the leader of the HR department, so HR Director, for example.

You would then have someone who is a project manager, an internal project manager. This could be someone from your HR team or you could even hire someone in externally to represent the internal team for the duration of the project.

You would have members of your HR team. Now these people would be considered the subject matter experts. These people will know how HR is performed within your organisation. Your HR team will also know the different processes, the issues, the challenges etc., and so they are a critical part of the internal team.

Your HR team would also be involved in cleansing the data. So when you select a system, typically the chosen provider will provide you with a data template, which you would need to populate, and we'll talk about data cleansing a little bit later as well, but that task would be an internal task.

Payroll team as well. If you are implementing payroll (some organisations will just take HR system only; others will take HR and payroll and some will take just payroll) as part of your scope, of course someone from your payroll team as a subject matter expert on that side is important.

Thereafter, system administrator. Now this doesn't necessarily have to be one particular person. The system administrator tasks can be included within your HR department job descriptions, for example. What does a system administrator do? A system administrator is typically the internal go-to person for any system issues that are encountered, and therefore that person needs to really be a system expert, *the* system expert. I should point out that typically this person does not have to be an IT professional. It sounds IT but this can be performed typically by HR.

Then moving onto IT, there is the IT team themselves. They may be involved in certain aspects of the implementation. It really depends on the basis by which you've deployed the software. So for example, if you took an on-premise licence route, whereby the data is hosted internally through your infrastructure and servers, in that deployment methods the IT department would be quite happily involved in maintaining the infrastructure.

However, most commonly nowadays organisations tend to go with software as a service cloud offering, whereby the provider is giving you the use of the software and is supporting it for you, and hence in those situations IT involvement is very limited. It's limited down to certain things such as Outlook integration, single sign-on, interfaces (if you need to build any interfaces, for example, between your chosen system and any third-party products that you currently use within the organisation, for example). So those are really the IT department's role. This could be quite minimal, depending on what you choose to do.

External consultancy. You may even have a very busy HR department that is busy doing a day job, if you like, and may not have the bandwidth to manage an implementation, and so you could opt to actually engage an external consultant, so [unclear – 0:11:30.6], for example, to help you carry out internal project tasks and duties.

Another key part of the implementation team is the steering group. Now the steering group is typically made up of your project sponsor, the project manager (so this is the internal project manager), at least one key member of the HR and payroll team, and if you were using external consultancy, a member of that team as well. And the objective of this group is to meet periodically throughout the implementation to discuss progress updates, to discuss any project risks or concerns (for example, it could be a key member of staff might be leaving or going on maternity leave). There could be other priorities within the organisation, in which case you might need to put this project on hold, for example. So there could be a number of different risks or concerns and this would be the platform in which to discuss and decide on solutions to these issues. Things like project budget is also monitored and updated and shared in this platform.

So at this point I'm going to hand you back over to Jo for a quick poll question. Jo.

Jo Faragher: Hello again everyone. Our first poll question of today's webinar is, 'Have you identified your internal project team?' So a) HR manager alongside their paid job, b) Yes, we have a dedicated team, c) No idea yet – we're too busy, d) None of the above.

Okay, so most of you – about half of you, in fact – have said that HR will manage it alongside their paid job. Is that what you were expecting?

Pritul Khagram: Yes. So this isn't what I very much expected, and in response to that what I say is that it is absolutely critical that if the HR team is managing the project that they are absolutely dedicated to the project, that you don't lose focus, and that strict project timeframes are agreed to include breathing space, because obviously your HR team does have a day job to do, if somebody takes a very meaty disciplinary case that your HR team has to handle, to knock the whole timetable out of sync for the entire project.

So those are some of the risks associated with it. I do understand that typically organisations when they're selecting a system have invested a huge amount of money and the tendency is that we won't get external help during this because the HR team can do it. But this does possess some risks with the implementation. But if that's carefully managed and monitored and everyone that's involved is dedicated to making sure it is a successful implementation then there should be no problems at all.

Jo Faragher: Okay, great. Thanks Pritul. I'll hand back to you now to carry on with your presentation before going to another poll.

Pritul Khagram: Okay, thank you. So moving on. So the next few slides focus on tips on certain areas of the implementation. So I mentioned data cleansing earlier. Data cleansing is a great opportunity to tidy up your current data. You may have this in various different forms currently in existing systems, paper-based, HR drive, in your heads, a combination of different areas, and so what will typically happen is that once you've selected a system, a provider will give you a data template which you need to complete, and normally the data templates are quite clunky. If anyone thinks it will be a simple cut and paste job they would be very much mistaken. It does take a lot of time to do this correctly and it is important to do it correctly at this time because you are going through this change programme and it is a great opportunity to make this better going forward, a good opportunity to see what data you need that is missing.

And also one thing to understand is how far backwards you go. If you are a 200-person organisation currently, that doesn't necessarily mean that's 200 employee records that you are populating into a data template. It could be your leavers for the past year or two, and that could add another 50, for example. So actually it's important to think about how many records you are needing to upload or populate onto a data template.

Documents as well is another thing that you need to think about. Decide whether to save documents or continue to save documents onto HR drives or whether you want to move all of these into the new system.

And so if you want to move them all into the new system, think about your documents' naming conventions. For example, 'My Passport' will not be sufficient. It would have to be something like 'passport_joebloggs'. And so it's important that you think about these things because this takes a hell of a lot of time before you're able to move forward with the rest of the implementation.

Normally when HR system providers implement HR systems the very first thing they need to do is have the data template populated and then they import that data live into your new system, and then they carry out the training and configuration with you, with your data live in the system, 'cause you can recognise that. And so the timeframe involved in undertaking data cleansing as an internal activity should not be underestimated. That's my tip.

So moving onto another poll question relating to data, over to you, Jo.

Jo Faragher: Thanks Pritul, and data's obviously going to be a huge issue for organisations on this software implementation journey, so we're asking now, 'Do you know what state your current data is in?' a) It's clean and inside an existing system, b) It's in various Excel spreadsheets, c) It's in both Excel sheets and is paper-based, d) It's paper-based only, or e) None of the above. Do feel free to vote.

Just getting some more responses now.

Okay, so again the majority of you chose a), that you do have clean data inside an existing system, although a lot of you – just under a third – are saying you have data stored in both Excel spreadsheets and on paper. What's your view on the outcome of this poll, Pritul?

Pritul Khagram: Yeah, surprising. Inside an existing system, what I would say is, 'What is the quality of that system? How easy is it to export data out of that system?' And then to import that data typically you'd need to import that data into the data template of your new system providers, the template that has been provided to you. So it may not be as simple as cut and paste. It might be still quite clunky because your new provider's template may have various different tabs relating to different pieces of information about employees, such as absence, holiday, employee details, personal details, home address and so on and so forth, and they may be on various different tabs. So it will still be quite fiddly; that's what I'm trying to get at.

Not surprising that option c came second, in that there is a combination of data in Excel sheets and paper-based, and this is quite common with implementations and therefore your data cleansing exercise for those organisations will take a lot of dedication and time and effort to get that nice and clean before it's imported live into a brand new system.

Jo Faragher: Okay, thanks Pritul, and I believe you're now going to move onto some tips on working with workflows and processes?

Pritul Khagram: That's right, yeah. So moving on then, workflows and processes. Both terminology typically goes hand-in-hand but it's typically your day-to-day HR processes that we can automate as much as possible. What's important here to remember is the 80-20 rule. You're not going to automate absolutely everything. There's still going to be some manual intervention from you, but you can try and automate as much as possible.

Now my first bullet-point on this slide talks about a 'vanilla' approach. So what's 'vanilla' approach? Vanilla approach is typically where the system has already got a process built in the product and you could adopt those processes as part of your HR processes. So this could fundamentally change the way you do HR and you handle certain HR processes because you're changing it in-line with how the system copes with it.

You could take the approach that, 'We'll change all the processes to the way the system handles it unless somebody within the HR team or within the organisation can justify why that should not be the case.' So that's one approach.

The other approach is, of course, procuring a system that is flexible enough for you to build *your* processes onto the system. And so when you're doing that it's typically called 'process re-engineering' and here what you would do is you would break down your current processes into little pieces and re-build them in-line with how the new system could cope with workflow processes.

When you're building these processes it's important to understand who the key stakeholders are for each process, and there are things like alerts, reminders, emails, task lists – all these different types of functions that are possible with workflows – and I guess you've got to understand if you're designing a workflow process (so let's take an example of a new starter process) there may be various different stakeholders involved internally within a new starter process, such as payroll, such as HR, such as finance, such as the person at the front desk, IT, for issuing laptops and email addresses etc. And so when you're building these processes it's important to understand who your stakeholders are and how they will be using your new system.

So in other words I imagine that IT would not be logging into an HR system every day to see what their tasks are. So therefore you may want to build your processes in such a way that when they are required to action something, that they get an email prompting them to log in, and therefore your processes are becoming seamless. And that's just an example. There are various other workflows that you can build – legal workflows – all kind of data-driven activities such as expiry dates of passports, visas, contracts, probation periods etc.

So there's lots of flexibility with respect to how you can manage your processes going forward on a new, sophisticated piece of technology.

Okay, moving on. So tips on reporting. So reporting tools within an HR system could vary depending on what system you go for. Typically you would, depending on the size of your organisation and how much reporting requirement you have, you'd typically go for a system whereby reports can be built from scratch, rather than a system where the provider has already built several reports that they think you will need going forward. Or a combination of both.

And there are two things to bear in mind. One is queries, and queries is typically you asking the system to produce some information because somebody has asked you to tell you what the headcount is in your sales department, for example. That is a quick query that you can ask the system and the results can be populated immediately through the system. Versus full-blown reports, where for example, the HR Director may request HR reports that he or she has to take to board meetings or senior management meetings on a monthly basis, bi-weekly basis or weekly basis.

And so when building these report it's very important to identify what is needed. Not just what is needed but *why* is it needed, and the question I tend to ask in report identification is, 'What decision are management trying to make from seeing these reports?' Sometimes we ask the question, 'Why do management need reports?' and often the answer is, 'Oh, it's just nice to know what the headcount is or staff turnover is,' etc., but I would go further and say, 'Why do you need that information? What decisions are you trying to make by seeing this information?' and then start to build your reports and identify what you need.

There can be some very complex reports that you can build on the system, and my advice there would be always as part of the implementation to use the provider's expert reports consultant services. This is where there will be dedicated reports consultants provided and they are absolutely experts in producing complex reports.

Who needs to be trained on reports? These are decisions you've got to make but it could be definitely HR, you may want payroll and finance, the senior management, other departments, certainly your in-house system administrator. Those are the people, the stakeholders, I would say, that need to be trained on how to produce reports.

Some systems have a dashboard available, which is a snapshot report – as you log onto the system you're able to see the information that you really need to see. It's usually updated in real-time and the settings can vary depending on the type of user. So employees logging in typically want to know what their annual leave entitlement is and how many days they've got remaining, whereas a senior manager logging in may want to see how many of his or her team members are absent today, for example.

Reports also should typically be able to be exported onto Excel, Word, PDF, various different formats that you would typically use in day-to-day working.

Tips on payroll. So with payroll what's very important is that you will typically have the current process in place, whether that's outsourced via a third-party payroll bureau service or you're using a piece of software currently that you're moving away from. What's very important is to ensure that you carry out parallel runs or 'mirror runs', as they're often known. And this effectively means that you're running both new and old processes together for at least two months, I would say. Some organisations would even do it for three months, just to make sure that your new product is processing payroll correctly and that the process is seamless and there isn't anything that's falling through the cracks. I'm sure you can imagine that if you pay your employees incorrectly or don't pay them at all for whatever reason, that's going to be a recipe for disaster, so getting the payroll implemented correctly is very, very important.

Online payslips, you've got to decide whether you want to make them available online and get rid of paper-based ones if that's what you currently have, but when you're doing that you need to think about what kind of access levels your employees will have to online payslips. Will they have devices or computers, PCs that are available to them or not available to them? Are they computer-literate? [audio breaks up – 0:32:00.0]

And finally it's very important that if you are taking an HR and payroll product that you actually implement the core HR module first and not the other way around. I've worked with various clients or know of various people that have done it the other way around and it usually always results in disaster 'cause the input of HR information is usually always from the HR module and the processing of pay is obviously through the payroll module, and that processing of pay, the information is obtained about employees from the HR module, so it's quite important to do it in that order.

Tips on self-service. So again if you're thinking of rolling out self-service, some of the things to think about are: How much access are you going to give to self-service users? If self-service is a completely new concept for organisations, for your employees, then you may want to think about just giving them very limited access to start off with and then start to add more functions on going forward.

There may be some self-service users that are part of senior management and they may require more access than just their own records. That's all good and well but think about whether they need to have read-only access or whether they actually need to touch the actual data. And my view is that typically you don't want anyone other than HR maintaining the data. You may want to give some people read-only access but there'd have to be a very good reason as to why they would want access to actually change data. In most systems there is a 'change by request' option in any case, which then goes through an authorisation process.

Before rolling out self-service it is advisable to carry out a pilot study, and this is essentially a group of employees that are trialling the product for you. Their task is to try to break it and to come back with some feedback and suggestions, which you would then take on board before your full self-service rollout.

Now your self-service rollout can be done by phase, by teams or locations. It really depends on your organisational structure. You should create a basic user manual. This is usually emailed out to all employees as you are rolling it out and they can refer to that manual for any issues.

But if you went with the approach where you wanted to train employees, the ‘train the trainer’ approach is probably the best. You may want to try to train line managers or heads of departments and then they can train their team. You could even create a short video presentation and ensure people watch that. You may want to have HR department surgeries so when you roll out self-service you may want to invite staff to a mandatory or optional walk-in-style surgery where you’re going to be stationed at five different times over a two- or three-week period and they can put their name down to attend any one of them whenever they can.

You may want to have dedicated training sessions for other departments, depending on what kind of usage you want to grant to them, such as finance or senior management. And you may want to also think about giving access via mobile. So effectively the employees’ experience becomes quite seamless.

Tips on recruitment. So recruitment modules typically help you sift through lots of applications. Killer questions are quite key – that will help you shortlist. So, ‘Are you eligible to work in the UK?’ would help sift through a lot of applications, for example. ‘Do you have XYZ qualification?’ which might be an essential criteria of the position you’re recruiting for. So killer questions is quite key. It helps shortlist.

A lot of recruitment modules or absence-tracking systems do have this automatic functionality of responding to applicants, rejecting them or giving them an acknowledgement etc. My advice on if you are using these functions as part of the recruitment module is that you don't send out personalised messages rejecting people two minutes after they've applied for a job, for example. That would be insensitive. That would mean that you haven't really reviewed their application carefully. And so those types of things people often forget about when they see that there is possibility to automate some of the processes.

You should try and give hiring managers access to the recruitment module as well. This is always helpful in making the process quite efficient, so they're able to effectively shortlist applicants through the system.

And make your recruitment module's online version available on your website and integrated with your website, for example. No doubt you have a careers or vacancies section in your website. You can actually integrate the online recruitment modules of certain products with your website so that actually, for the applicant, it seems like they're just visiting your website and applying for a job, but in reality it's diverting them to the online recruitment module of your new product.

Okay, project planning. So very important that you've got the right people, both internal and external, or from the provider's side, managing your project or involved in the project. Always have a phased rollout by either module or location or priorities. If you go with an 'all guns blazing' approach and try to roll everything out simultaneously usually that is a recipe for disaster.

Allow plenty of time for data cleansing. I can't stress this enough. I mentioned this a few times earlier. Give everyone some breathing space as well. Don't forget that if your HR team is managing the project that they have a day job to do. So when you're coming up with a timeframe for your internal project plan, just factor that in.

And coming onto the internal project plan, usually the internal project plan is very different to the provider's project plan. The provider's project plan typically is what date do they need to send consultants on-site for workshops, training, configuration sessions etc., whereas the internal project plan is who is going to populate this data, by when, when are we going to roll out self-service, who are we going to roll it out to, etc., etc. So there's a difference in the project plans and so this is why typically you would have two project managers – one from the provider and one internal.

Project risks are things that you need to take into account. Is there anyone going on annual leave? Is there a key person going on annual leave? Is there any sickness? Are there key people leaving the organisation halfway through the implementation? All of these types of things are potential project risks that you need to be aware of.

Giving notice to the old provider. If you have an existing system you may need to look through your contract with the current provider to see how much notice you have to give to them and the timing of that notice, I guess, is quite crucial for you.

And managing change. As I mentioned earlier, it is a change programme and you'll have a lot of people feeling insecure or nervous or just not willing to accept change. So just to manage that is quite important as well.

Finally, coming onto measuring the success. How do you measure the success of an implementation, of a successful implementation? And so here are some ideas.

Accuracy of information. You've now got very accurate data because you've spent a lot of time and energy cleansing that data early on in the implementation.

The turnaround time for information requests from senior management, so senior management tend to ask questions and want those answers pretty much immediately, and in the absence of a sophisticated piece of technology this often takes days or weeks even to produce. You should now be able to do this through the new system and provide the information almost instantaneously.

HR department would be more involved in value-add activities. There'll be less transactional activity. A lot of processes would be automated, which means that things won't fall through the cracks. Was the project on time and in budget? And were the employees paid on time and correct? So these are some ideas of how to measure the success of a project.

And that's it. So that leads us onto the Q&A session, so over to you, Jo.

Jo Faragher: Thanks, Pritul. Lots of food for thought there. Before we go into the Q&A or while we're in the Q&A we're just going to ask participants a question about what stage they're on in their software journey. Essentially we're just looking to see where we are in terms of implementing a new HR system. So there are five options: a) We are currently in review, b) We're looking at it in 3-6 months' time, c) 6-12 months' time, d) 12-18 months' time or e) 18+ months' time. So that poll will be going on throughout the Q&A, so feel to respond whenever. That'd be great. Thank you.

And now I'm going to move onto the Q&A and first of all we have a question from Jeremy, Pritul. 'Any advice on implementing a new learning management system for an organisation that's in the process of reform? This reform will be on-going for four years but we're working towards a new operating model in the new company.' So what sort of advice could you give Jeremy?

Pritul Khagram: Okay, so learning management systems which are dubbed as 'LMS' are typically for training. What's important to understand here is what you're trying to achieve, because most products will allow you to record training information or allow employees to request training and it allows you to put in things like expiry dates for certain certificates that might have a timeframe in their validity. So you can use workflow to help notify employees or HR or the training department on when things are expiring, so it helps you plan things.

So that's one thing. So that's all the recording and the requests and the expiry dates and alerting people of certain events, if you like. The other aspect is actually designing your own courses through the LMS and rolling that out as an online course to all your staff, where they can attend the course online, they can carry out tests, and the results can be evaluated using the system etc., etc. So it really depends what you're trying to achieve. An LMS is typically the latter of what I've just described and therefore is almost a standalone system. There are some products out there that would have almost an LMS as a module, but I would say it's quite specialist in its nature. If you just want the ability to record training information and manage training requests etc., then an HR product is suitable. But yeah, if you wanted to actually roll out training going forward using this system to roll out training, then you need a special LMS, and I would suggest getting a standalone system.

Jo Faragher: Okay, thanks Pritul. We've got another question here from Andrew. He says, 'How long should we allow for data cleansing?'

Pritul Khagram: I was expecting that question and the answer is there's no real mechanics around the answer to that, to be honest. It's a little bit like asking how long's a piece of string. Look to see what the quality of your data is like currently. Which form is it in? Is it a combination of Excel sheets and paper-based and HR drives and information in people's email etc.? Then that's going to take you quite a long time. If you've got data that's quite orderly, documents are named nicely, then that could take less time.

But just to give you an idea, we help organisations with the data cleansing exercise and we've recently done one for an organisation that has 150 employees and they have approximately 50 leavers. So in other words, 200 records. That took approximately 20 person-days of effort. And their data was in a combination of Excel sheets and existing systems, paper-based etc., etc. That's just one example. That's not to say that yours will be that long or that short, but that's to give you a rough idea.

Jo Faragher: Okay, great. Thanks, Pritul. Another big issue is dealing with the workflow processes, and Jennifer has asked, 'How many workflow processes should we start off with?'

Pritul Khagram: Okay. Good question. So typically when you're implementing a kind of mid-range product you would start off with your biggest workflows, which are typically your new starter and leaver processes. Those are the two main ones. And then you would add certain other ones, such as expiry date workflows, such as passport expiry, visa expiry, probation expiries, contract expiries, that kind of stuff.

So I would say to start off with 5-10 different processes is adequate. But what you will tend to find is as you start to use the product and as you start to see the benefits of workflow and the quality of workflow, and you're able to see how things have become much more efficient in the everyday course of your activities, the HR team will typically think of different workflow ideas. So workflows is always going to be a continuous activity, to be honest. So you'd start off with your key ones and then move on with many more going forward.

Jo Faragher: Okay, fantastic. Chris has just come in with a question. 'Do you have any additional advice for small organisations of less than 250 people?'

Pritul Khagram: Any additional advice? Just that, you know, your data is quite important, project team is quite important. I guess rolling out self-service, how you would roll that out. You might want to phase that. You may want to do it by location or department. But other than that I think the only advice is just have a clear project team in place and a clear project plan, an internal project plan and a provider's project plan, and make sure that there is plenty of breathing space if your HR team is involved in that implementation, and that you don't set unrealistic deadlines unnecessarily because it just results in stress from all angles.

Jo Faragher: Okay, that sounds like good advice. David wants to know, 'How much involvement should IT have in the implementation?'

Pritul Khagram: Minimal, is the short answer. There are organisations that seem to think that IT departments can lead an HR software implementation. That is not the case. They're not HR people, they don't understand day-to-day HR and typically the products are built with HR people in mind. So in other words, HR people should be able to build workflows or add new screens or add new fields, produce reports etc., etc. The involvement from IT should be limited to anything that's really technical, such as Outlook integration or interfaces with third-party products or items such as single sign-on, those types of activities, which in the grand scheme of an implementation product is not too heavy. It's probably a couple of person-days of effort from IT.

Jo Faragher: Thanks Pritul. This is a good question from Alison. 'Any advice on the actual selection of a system provider? So if you're in a stage where you're looking at different providers, what sort of thing should you take into account?'

Pritul Khagram: Okay. Yeah, I think Alison must have missed my earlier webinar on selection a few months back. But yeah, selection is something that needs to be managed extremely carefully. It's a big investment that you're making. I think you've got to evaluate your requirements very carefully by engaging with all the key stakeholders, making sure they are fully involved in that process, and once you've got your requirements documented and signed off by all the key stakeholders, then you'd go out to market to find suitable products that would meet those criteria and requirements. You would shortlist them down to, typically, I would say, three providers that would come in and do an overview demonstration. Then you'd invite two of them back for a much more detailed, bespoke demonstration. By that I mean you dictate the agenda and you provide them with lots of scenarios as to what you'd like to see from that session.

Reference-checking is quite important as well. Speak to existing customers of your provider. And also setting a budget is quite important. You have to be very realistic as to how you set a budget. You could have lots and lots of requirements. Your requirements may be like a Rolls Royce but you may have a budget for a Ford Fiesta, for example, and so you have to be very, very realistic in how you set that budget as well.

So quite a lot to think about. I'm not sure if my previous webinar on that is still available on demand on Personnel Today.

Jo Faragher: It is, Pritul. Yes, I was just going to say to Alison, if you go to www.personneltoday.com, the webinars tab, that should be on demand. So if you want more details on that, that will be there.

Okay, probably one final question now. Sarah has asked, 'What are your tips with getting line managers on board with the new system and in particular with self-service?'

Pritul Khagram: Oh, they're the easiest people to please, to be honest, throughout the whole implementation, because just managing the holiday request process through the system and then being able to see how many days their team have got left, who has taken holiday at the same time as the request that's just come through, being able to cancel or amend a request and going through that authorisation process is quite seamless. So self-service for line managers is an absolute godsend. They're the most simple people to please.

Jo Faragher: Okay, thanks Pritul. I think that's just about all we have time for today. So it just leaves me to thank Pritul Khagram for his time and expertise this afternoon. As I said, please look out for our upcoming webinars and numerous on-demand webinars at www.personneltoday.com/webinars.

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