BUILDING YOUR DREAM HCM / PAYROLL SYSTEM
JOHN BERNATOVICZ
President and Founder

WHO IS JOHN?

- @JohnBernatovicz on Twitter

- Willory President and Founder

- Active member of Cleveland Chapter of APA including Speaker Coordinator & Membership Committee

- Board member of IHRIM (HR technology organization)

- 19+ years of experience within the payroll and HR niche

FIVE HATS

JOHN'S FIVE HATS

1. HCM Vendor Sales

2. HCM Vendor Implementer

3. Client Decision Maker

4. Client Implementer

5. Consultant Implementer

WHO IS WILLORY?

WILLORY IS.....

Fastest growing STAFFING and CONSULTING firm in the U.S. that is SOLELY focused on HR & PAYROLL

WILLORY'S FOCUS

Talent – Fit & Alignment

HR & Payroll Operations – Efficient & Best Practice

HCM Systems – Integrated & Best-in-Class

BUILDING YOUR DREAM HCM SYSTEM

SHOULD WE STAY OR GO?

EVER REMODELED OR BUILT A HOME?

1

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PHASE 1:
CURRENT VS. IDEAL

UNDERSTAND YOUR CURRENT DESIGN

DISCOVERY

DISCOVERY INCLUDES:

Examine ALL of your HR, Payroll, and Benefits processes:

• What is working well? Why?

• What is inefficient? Why?

• How many people and systems are involved?

• Functional details / complexities examined

DOES YOUR SYSTEM LOOK LIKE THIS?

CHECK THE PLUMBING
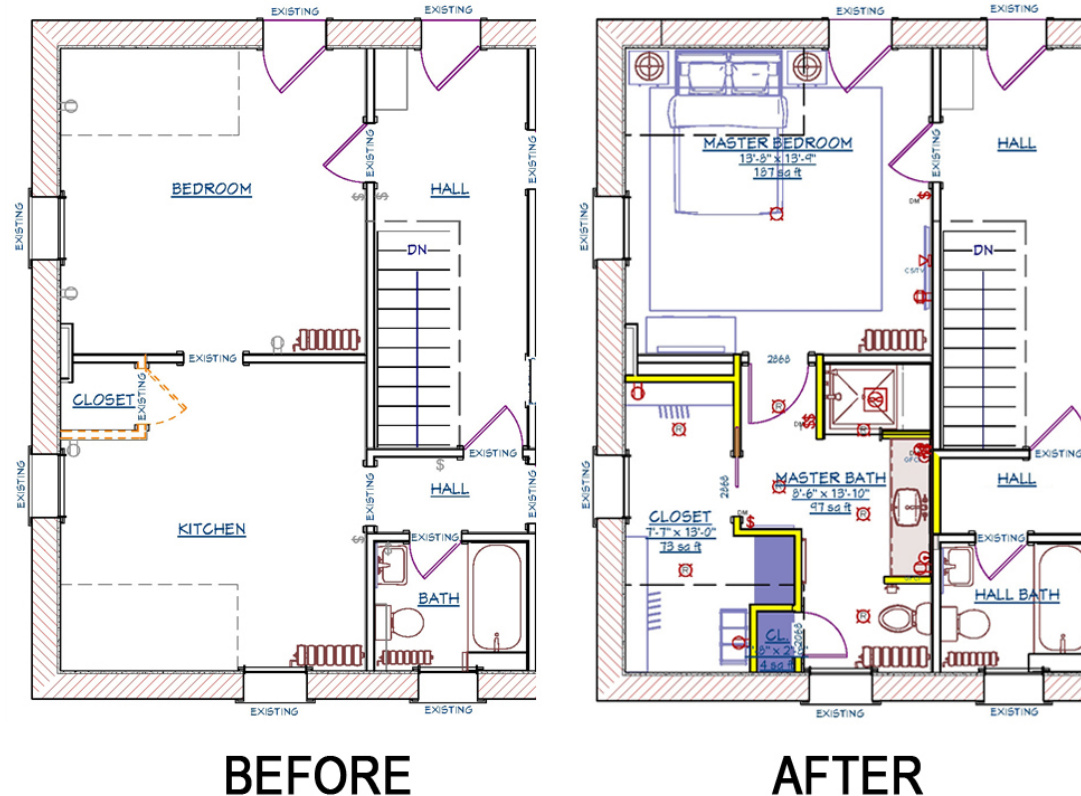
WHAT IS THE IDEAL STATE?

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PHASE 2: DOCUMENT

PROCEDURES DOCUMENTED

DOCUMENT CURRENT VERSUS IDEAL
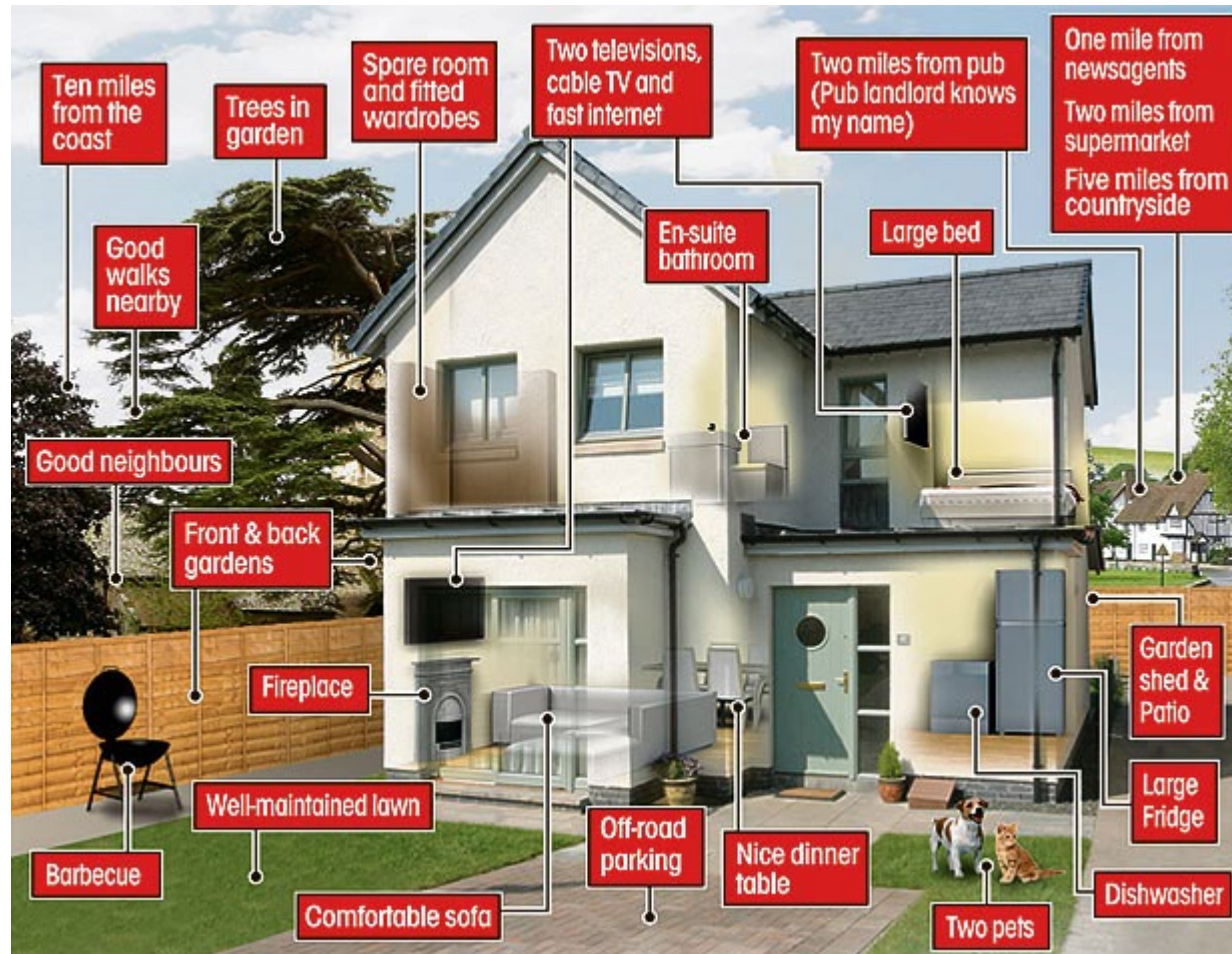

Second Floor Remodel

BEFORE   AFTER

IDEAL STATE

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PHASE 3:
THINK!

DISCUSS WITH STAKEHOLDERS

START TO DETERMINE & INVOLVE TEAM

PHASE 4: COUNSEL

VENDOR MEETING

CURRENT VENDOR MEETINGS

Review your HR, Payroll, and Benefits processes:

• Share "honey-do" list. How can they help solve?

• Discuss ideal state. What does their roadmap look like?

HCM / PAYROLL CONSULTANT

PHASE 5: REMODEL vs. NEW

<REMODEL

NEW>

WHY REMODEL?

- Comfort with current vendor

- Belief that vendor's roadmap aligns w/ future vision

- Incumbent knowledge of current system

- Best for supporting business needs

- Significant investment/time with current vendor

WHY NEW CONSTRUCTION?

- Irreconcilable differences w/ current vendor

- Visions do not align

- Change required to better align w/ business drivers

- Integration, mobile, social, talent, reporting & added services

PHASE 6:
BUSINESS CASE

STRATEGIC BUSINESS DRIVERS

- Alignment with strategic plan

- Consider mission, vision and values

- Start-up, growth, divestitures, acquisitions, etc.

- International, new product line, etc.

- Legislative / compliance impact (i.e. ACA / SOX)

- Other initiatives for IT, HR, Finance, etc.

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COMPONENTS OF A BUSINESS CASE

- Present the forecasted benefits associated w/ project

- Link the benefits to an operational impact (if -> then)

- Project KPI's with each forecasted benefit

- Document financial risks of "do nothing"

- Describe how project aligns to strategic plan
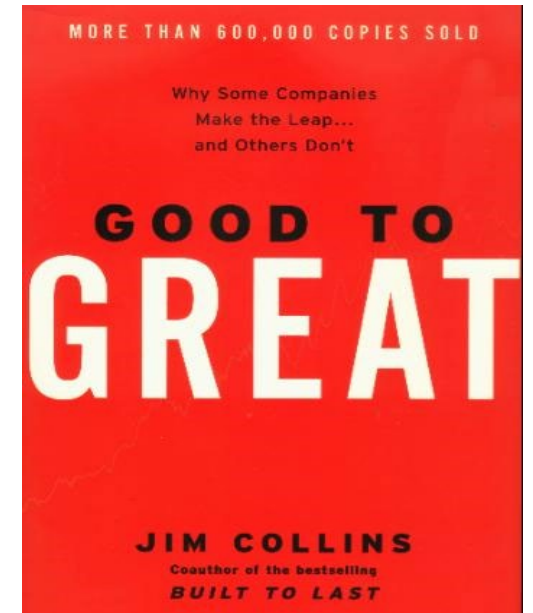
PHASE 7: VENDOR SELECTION

YOU'RE AHEAD OF SCHEDULE

- Discovery ✔

- Requirements ✔

- Ideal State ✔

- Team ✔

REQUEST FOR PROPOSAL

CREATE YOUR SELECTION PLAYBOOK

Executive Summary
- Who is on your team?
  - Stakeholders
  - Project team
- What is the objective?
  - Discovery

Design your playbook
- Project plan – timeline, tasks, costs, responsibility

Key success factors
- Required resources – people, funding & time

KEYS OF AN EFFECTIVE RFP

- Be specific and describe uniqueness / complexities

- "K.I.S.S." motto

- Detail exactly what you want back from the vendors

- Establish your scoring process

SELECTION PLAYBOOK - SCORECARDS

Criteria	Weight	Unweighted Score			Weighted Score		
		Vendor 1	Vendor 2	Vendor 3	Vendor 1	Vendor 2	Vendor 3
1 Adherence to RFP Instructions	15	2.5	3		12.5	15.0	0.0
2 Company Information	15	2	3		10.0	15.0	0.0
3 Project Understanding	10	0	2		0.0	6.7	0.0
4 Functional & Non-functional Requirements	10	2	3		6.7	10.0	0.0
5 Implementation Approach/Methodology	5	2.5	3		4.2	5.0	0.0
6 Project Organization	5	2	2.5		3.3	4.2	0.0
7 Expected Buyer Duties	5	3	3		5.0	5.0	0.0
8 Project Management Approach	5	2.25	2.75		3.8	4.6	0.0
9 Training & Knowledge Transfer	2	2.25	2.75		1.5	1.8	0.0
10 Post Implementation Approach	5	1	3		1.7	5.0	0.0
11 Past Perfromance & Related Engagements	5	1	3		1.7	5.0	0.0
12 Oral Presentations	5	1	3		1.7	5.0	0.0
13 Risk Identification	5	0	3		0.0	5.0	0.0
14 Fee Summary	5	0	3		0.0	5.0	0.0
15 Professional Arrangements	3	2	3		2.0	3.0	0.0
TOTAL (out of 100)	100				48.58	72.25	0.00

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WHAT VENDORS TO INCLUDE?

- APA

- Network

- LinkedIn groups

- Internet search

- HCM / Payroll consultant

HR/PAYROLL TECHNOLOGY MARKETPLACE

sumtotal

bambooHR

Cornerstone
ONDEMAND Empowering People

workday.

SAP

infor

Ultimate
SOFTWARE
People first.

paylocity

salesforce
SOFTWARE

iCIMS

Jobvite

BULLHORN

Fairsail

SABA

WorkForce
SOFTWARE

KRONOS

peoplestrategy

CPI-HR
BENEFITS | PAYROLL | HR
BENEFITS ADMINISTRATION
Member of Benefit Advisors Network

FF

successfactors
An SAP Company

ORACLE

ADP

CERIDIAN
Trusted Results. Transformative Technology.

PROJECT TEAM

- Executive sponsor(s)

- Project Manager

- SME's – Payroll, Benefits, HR, Time, Comp, Talent, etc.

- Information Technology

PHASE 8:
VENDOR DEMOS

BEST PRACTICES FOR DEMONSTRATION DAY

- Necessary tools: Scorecard, agenda, selection guidance, specific examples / samples

- Project manager leads meeting

- Nominate a note taker

- Schedule on consecutive days (could be all-day)

BEST PRACTICES FOR DEMONSTRATION DAY

- Prepare logistics including meeting room, projector, web connectivity, food and breaks

- Include time for attendee prep meeting and vendor set up

- Set meeting rules of engagement

- Plan for vendor selection team debrief meeting

BEST PRACTICES FOR DEMONSTRATION DAY

Recommended topics for demo scripts

- Implementation methodology / training

- Support framework

- Reporting, analytics and dashboards

- Integrations / interfaces / API's

- Differentiators

- Specific "day-in-the-life" scenarios

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PHASE 9: DECISION

HOW TO DECIDE

- Scorecard, scorecard, scorecard!

- Cultural fit

- R.O.I.

- Alignment to business case and company's needs/future

- Use your leverage to negotiate

PHASE 10: IMPLEMENTATION

"DO NOT'S" OF A SUCCESSFUL IMPLEMENTATION

- Just core

- Expect things to go perfectly

- Lose momentum of vendor relationship

- Underestimate the amount of time, work, stress, etc.

- Forget your day job

SYSTEMS VIDEO

- https://www.youtube.com/watch?v=TWjSK3Xp308

"DO'S" OF SUCCESSFUL IMPLEMENTATION

- Follow a process from start to finish

- Leverage the discovery, vision, and business case

- Remember the "why"

- Plan, plan, plan!

- Be realistic about timing, requirements and resource need

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LESSONS LEARNED

1. Project Management

2. Change Management

3. Reporting

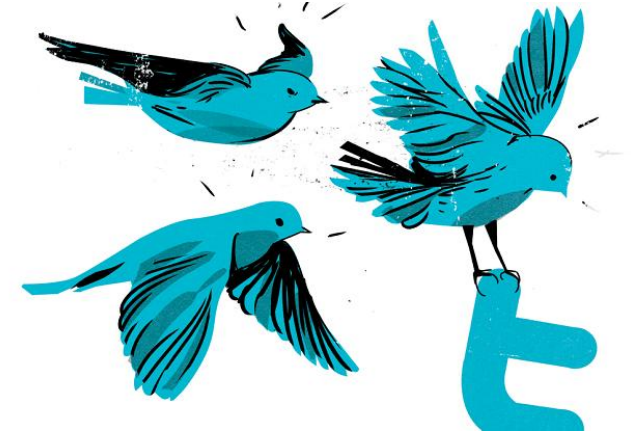4. Resources: functional or technical

5. Translator

QUESTIONS?

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