

Checklist

HR Technology Change Management



Helping the World:
A Revolution in Delivering
People Loving Technology to HR professionals



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Where To Start

The good news is that setting up HR Software is becoming easier and faster. The best Cloud HR Software Platforms now enable you to realise your investment much more quickly. Gone are the days when you or your business might suffer a rude awakening after the honeymoon period is over. Many businesses have been caught out after going through the sale process, thinking that their new HR software will solve all the HR and business problems simply by virtue of the software having been installed. Either that, or you discover that the sales people have told you what you want to hear, only to find that you have been over promised things that are not possible, either intentionally or because they don't actually listen to, or understand, the unique needs of you and your business.

The definition of the difference between a Software System and a Software Platform can be seen in the smarts that a Platform has. These smarts both enhance AND enable (instead of creating blockages) the change management process you will need to implement in parallel to the implementation of your HR software.

Platforms allow for highly customised configuration, they also allow for fast changes in process automation and data structure management. What that means for the end-user, is the capacity built into the Platform that makes it possible for HR and the business to configure and deploy the software in a way that supports your business requirements and decision-making processes.

A lot of HR Software Systems on the market have been presented to users as eye candy to attract users, but the functionality of that eye candy doesn't necessarily translate into the hoped for ROI and business improvement that is promised during the sales process. What is missing in these systems is the change management functionality to adapt to the necessary changes in the process and data structures. What many HR professionals and business decision makers don't realise is that the underlying mechanics of these types of Software are incredibly rigid and inflexible, meaning that changes to the software are complex and costly. Not only that, there is no native functionality within the system that can be used to compliment in the HR software implementation by also providing functionality that can be used to manage the change management necessary to introduce a new software platform to the business in a way that ensures it was be used at full capacity and generate a return on investment as well as creating positive change.

So let's now take a look at how HR professionals can assess the features and benefits of both HR Systems and HR Platforms to avoid the pitfalls of eye candy. We're committed to giving you the tools, and the smarts to be able to choose a quality, cost-effective, agile and secure HR Platform for your business.



Tools For Change Management: Data

Your data is what ultimately provides you with insights for decision making. The more inclusive and accurate the data, the better your ability to make decisions. So when it comes to technology, getting data into an HR Platform is a key part of setting it up and being able to justify its existence within your business. Firstly, you need to consider what format your HR data is held in. Is it currently held in a legacy system is it all stored in excel files, or are you still using hard copies on paper?

Rigorous preparation of your HR data for import is going to make it much easier to upload it into your new HR Platform. What you need to ask yourself is: does your new HR platform facilitate the easy upload of ALL your HR related data by a novice? Or, does it require a BA and Developer to undertake the process of data input?

If your answer is a BA and Developer, you can automatically add thousands of dollars to what will become a much more costly and complex process. However, if the answer is that a novice can upload the data into your new HR platform, then you have already cut costs and complexity out of the initial set-up of your platform (and the ongoing scaling of it). Chances are, if you are going to need a BA and Developer to upload data for you, you are dealing with a Software System not a Software Platform. Remember, a system has not been designed to be future-proof, nor with your sanity and budget in mind. There is no service orientated architecture underpinning the database fields and logic in a system, but there is an a platform.

Tools For Change Management: Workflow

Automation of Workflow processes are the most powerful tools for reducing administrative load. Once designed and implemented, automated workflows can free up enormous amounts of time for both HR practitioners and Managers. It is important to know what your top 10 Workflow processes are before you start, and to have mapped them in minute detail.

For your new Platform to enable you to achieve a rapid ROI, these Workflow processes need to be delivered into your system as part of the early phases of implementation. Workflow processing also needs to be easy to administer by a novice, without the need for a BA or a Developer. Pre-configured Workflows allow you to get traction quickly.

You also want the HR Platform that you decide to implement to provide the capacity for you to customise and link forms to workflow processes, and this should be facilitated through end-user orientated tools within the platform. If this can't be done, your ability to action and automate processes that have not been thought about during the information gathering requirements phase will be limited. A lack of such functionality can cause the costs of an HR System or Platform project to blow out significantly.



Some of the key Workflow processes that are regularly requested by customers and which you would be well served to ensure that you will definitely have access to, are:

- Request to Hire,
- Send Survey to Applicant after Application,
- Absence Request, Timesheet Submission,
- OH&S incident Submission,
- Request Training,
- Submit Onboarding Documents like Certificates and Licences,
- Letter of Offer and Contract Authorisation,
- Performance Review Notifications and Interaction.

Tools For Change Management: Forms

Closely related to the functionality for data and workflows, is the functionality and flexibility of the forms in the Platform. What happens if your form requirements are out of alignment with what is standard and possibly fixed in your HR Technology Platform.

Again, do you need to get Developers and BA's involved in updating your interface and forms to meet the specific needs of your business, or is the Platform agile enough to facilitate a novice making the changes? In differentiating between an HR software product and an HR Platform, you can easily see that if the system has not been designed with user driven customisation and configuration in mind; Forms, Workflows and Data Upload will be difficult, time-development consuming and costly.

HR Platforms have been specifically designed to enable the maximum amount of the implementation process to be managed by users with little to no development skills and experience. This means end-users can configure the interface through point and click type tools that allow for Fields, Forms, Tabs etc to be updated quickly and effectively. The result is that functionality to meet your needs will be able to be deployed around the business into multiple locations effectively, efficiently and at a minimal cost.

The above smarts can all be used to make your roll-out efficient and fast. You still need to have a good change management and implementation plan. You need to understand what you are going to do with your flexible HR Technology. Here are some questions to ask internally to understand more about your own needs.



HR Tech Starter Questions

- What format is your data currently in and does this match the upload interface of the HR Platform you're considering?
- What types of data need to be uploaded into the HR Platform?
- Is your data currently available or do you need to manage this to get it into the right format?
- Does your Payroll system allow for RESTful API integration?
- Can you use your Payroll system as the source of data upload for the HR Platform?
- What are your 10 Top Workflows for automation (including Onboarding) and have these Workflows been mapped?
- What are the 10 Top 'nice to have' Workflows?
- Are the Top 10 nice to have Workflows going to require complex customisation in your chosen HR Platform?
- Do these Workflows cover Recruitment, Performance and Core-HR processes?
- How many locations need to receive the new Platform?
- What are the different types of Login access that need to be deployed for users in these locations?
- What is the likelihood of your HR needs changing within 12 months, 3 years and 5 years of going live?
- What do these changes look like?
- Have you got 'Data Set Snapshots' for all the key areas of your current data management so you can compare this to the fields in the HR systems you are looking at?
- Have you included all key stakeholders in the process of gathering these requirements?



HR Change Management Plan

When you are embarking on implementing a new Cloud HR Software Platform, it is important to remember that the longer it takes to implement the software, the more risk and chance there is that the people who selected it may or may not be there when the system starts to be used in its entirety. The longer the implementation process takes, the higher the likelihood that there will be staff transitions that may or may not affect the way in which the system is used. This means:

1. You need to diligently document the functional use of the system including customisation changes.
2. You need to ensure the system is not overly customised, so that standard functionality is used in order to simplify the change management process when new users come onboard.
3. Configuration changes are fine, as they can be tracked and viewed through user interface orientated objects in the Cloud HR Software. Code level changes are harder to view, which means documentation is important.

Announcements

At some stage during the implementation process, it is important to remember that end-users need to be engaged in the roll-out. The best way to do this is to plan for key steps in the roll-out process. Here are some options for you to consider:

1. Conduct a competition in which the Employees are rewarded with coming up with the new name of the new HR Software.
2. Publicise the new Platform and its name through e-mail communiques and posters which are spread around the office/s. In the posters educate Employees about what to expect. Functionality based FYI and why it is important that people use this system.
3. Link all functionality and process improvements to achieving your business goals, your vision AND your values.
4. Produce 'Snapshot videos' for each user group, educating them about how to use the new software.
5. Plan each of these phases and base them on when each user group is going to have access to the system.



Get the Basics Right

Implementing a new software platform requires a top-to-bottom assessment and understanding of your business needs and extends far beyond software functionality needs. Many businesses neglect these considerations during the research, preparation and assessment process, and they do so to their detriment. Before you start, make sure you have answered these questions in relation to your business:

1. Do you know what functionality you need from the system and can you link these needs to achieving your business goals, your vision AND your values?
2. How is the system going to help achieve this?
3. What are the functional requirements you need?
4. What system do we currently use and how do these relate to / interface with the new Platform?
5. What are your priorities in terms of information management and process automation?
6. Is the HR Software Platform best of breed or unified best?
7. What level of integration of your current business silos is required?
8. What timeframes are in play?
9. Do I need buy in from multiple stakeholders?
10. How are you going to communicate your needs to the rest of the business?
11. Are there any difficult personalities that need to be managed?
12. Are there agendas outside the leadership team that I need to navigate?
13. What decision making authority is needed for sign-off?
14. Do you need an RFI?
15. Do you need IT input?
16. What Security and privacy requirements are there for your business?
17. What elements of our procurement process do you need to make vendors aware of early on in any procurement process?
18. Have you thoroughly assessed the Workflow, Data and Forms functionality on the HR Software Platform to ensure that it is: agile and flexible, customisable and meets the unique needs of my business?



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