



Selecting a Workforce Management System.

Advice and Tips before you buy.

White Paper

This impartial guide has been written to assist you in the decision making process of choosing a Workforce Management System. We offer advice and tips before you buy so that can be 100% confident that you have made the right decision for your organisation.

Introduction

More and more organisations are looking to optimise their use of labour – their single largest overhead – and minimise labour-related costs. Many organisations are replacing the stand-alone, often manual systems used to manage staff hours and working patterns with integrated software-driven Workforce Management (WFM) Systems that make the whole process of managing attendance, absenteeism, overtime, flexible working, scheduling and holiday leave considerably easier.

Today's integrated WFM systems include products and solutions for managing and automating time & attendance/flexible working, activity recording, scheduling & staffing rosters, legislative compliance, overtime, planned and unplanned absences and skills tracking, which can help companies in the smooth operation of their activities. When properly configured and implemented, they can deliver tremendous savings, efficiencies and assist in streamlining the business.

We have put together some advice to help you do the homework needed in order to purchase a Workforce Management system. It is not a buyer's guide, it won't tell you which system is best. But it will tell you what to look out for, both in the product itself and in a supplier and by using it you should be able to avoid some of the common pitfalls and increase your chances of making a sound investment decision.

1. Starting off

When looking for a new car, even if you are undecided about which make or model to go for, you will know the broad category of vehicle you are interested in, be it a family saloon, a people carrier or a sporty two-seater. It is the same when purchasing a new workforce management system.

It's important to know what your needs are. For example, there is no point considering a large multi-site application with all the bells and whistles, if you simply need a system that manages the comings and goings of your staff. Likewise, a small, less flexible system may not be of benefit to an

organisation that is multi location and country.

A good starting point is to make a wish-list of the key things you would like your system to achieve. Perhaps you want to manage planned and unplanned absences, introduce flexible working, minimise overtime, and identify potential labour budget overruns before they happen, or reduce payroll errors. Whatever your objectives, having a clear idea of what your organisational needs are, will help you and your supplier choose the right system.

It's a good idea to think about the different types of people and roles in your organisation and how the new system needs to work for them. Meet with your staff/colleagues to get their input. They may come up with issues you had not thought of or make useful suggestions.

Before meeting any suppliers, consider how the system will work best in your organisation. For example if you are looking to manage time and attendance, consider how data will be collected. Plenty of companies are still using traditional badge and card-based swipes and these systems serve them very well. However, there is a wealth of other options to consider, from proximity smart cards, pc and web clocking and pin terminals to biometric finger and hand-scanners, touch-screen kiosks and even out of the box facial recognition readers.

Do some research on the various options out there before meeting any suppliers. Equip yourself with some facts and, in particular, look at the pros and cons of each technology from your own company



and company's cultural perspective. This will stand to you when you meet suppliers to go through the options.

Organisations today are using WFM solutions to more efficiently manage and optimise workforce planning, scheduling & modelling, facilitate flexible working options, respond to legislative compliance and best practice obligations, and manage planned and unplanned absences.

2. Choosing a system

Here are some things to consider when choosing a workforce management system:

Will it integrate?

Depending on the size or nature of your organisation, you may be happy for your workforce management application to stand alone within your IT environment. However, it is more likely that you will need it to integrate with the various other applications you have running, such as HR and payroll. This removes data duplication and ensures that there is a single data source circulating in your organisation.

Most workforce management products are designed to integrate fully with existing applications but you need to find out how this integration will work, how long it will take and what sort of costs will be involved.

Onsite or hosted?

Like most software these days, workforce management systems can be deployed in one of two ways. It can either be installed and run on local servers or, alternatively, hosted by your supplier and delivered over the web as a service (Software as a Service).

Hosted services have become popular in recent times because they allow users to access and manage their system from any location that has access to the Internet. In addition, users don't have

any upfront hardware investment costs or on-going maintenance overhead; instead, they pay a monthly subscription to use the service.

Before choosing either model, give careful consideration to which option will suit your business better. If you opt for the hosted model, compare the hosted offerings out there, paying particular attention to the security and technical support provisions.

What information will I need?

By its nature, workforce management software collects, or has the potential to collect, a huge amount of information about your business. How it arranges and presents that information to you and your staff is a critical aspect of this type of software. You will want reporting tools that are user friendly and that can tailor the information to the user's role or position in the organisation.

As part of this, you should ask about the employee self-service options available, i.e. the ability for employees to go into the system themselves and perform a variety of tasks such as make holiday requests, view their attendance records and hours worked, record roster preferences, swap shifts with other employees etc. Such functionality is increasingly popular as it cuts down on HR and payroll administration and helpdesk costs.

Don't confuse cheapest with best

Price is often a key purchasing criterion for an IT purchase – any purchase in fact – but especially so during these current economic times. However, while you will understandably want to get 'bang for your buck', it is very important that ticket price is not your sole purchasing criterion. This is because the money you save in the short term by going 'cheap and cheerful' will likely be far outweighed over time by the money you need to spend on the unforeseen labour and technology costs that come with operating a badly engineered and poorly supported system.

Instead of 'cheapest possible', therefore your mantra should be 'total cost of ownership' (TCO). This

means that you evaluate systems not on their ticket price but on the total cost of running that system over its lifetime. Very often the cheapest systems will have the highest TCO and your cheap and cheerful system – or so you thought – will become a financial millstone.

Look ahead

IT investments should be as strategic as possible. Yes, you are buying because you have a pressing current need but think, too, of the future. What will your business look like in a few years' time? Are there any new markets you expect to enter and how will these affect the shape of your business and the work routines of employees? In terms of workforce management systems, it makes sense to consider those that offer a high degree of flexibility, and can change as your business changes.

3. Choosing a supplier

There are two basic types of software supplier - those that make their own product (developers) and those who sell other peoples (resellers). Each has its own place in the food chain and its own advantages. For example, resellers tend to have lower overheads because they don't develop their own product.

Developers are in a better position to respond to customer demands and react quickly to changing trends and technologies because they have complete control over their own technology and the product pipeline.

Industry-specific expertise

One of the most important things to look for in a supplier is a track record in your industry sector. Track record does not mean a product that is suitable for your industry. It means having customers in similar businesses to yours. A supplier can say its system is tailored to a particular industry but unless they have the reference customers to prove it, you will be taking a big risk if you opt for that system. Don't be afraid to ask to be put in touch with customers so you can find out for yourself what the system does (and doesn't do) for them, what they like about it (and what they don't), and what they would do differently next time. You can learn a lot from other people's experience of

using IT before you spend. It will of course take time and effort on your part but it should be well worth it.

Services and support

Unless they are selling the very cheapest of product, all business-to-business technology suppliers offer some level of back-up support. The sort of questions you should be asking suppliers is: who will fix my system if something goes wrong? How long will it take to repair? What support packages do you offer? What hours is your helpdesk open? Do you have field engineers who can fix my problem if the helpdesk is unable to?

Many IT suppliers also wrap a range of services around the technology they sell. Some of these may be useful to you, others will not, but you should get as much detail about these as you can, including the costs involved, before signing up for any of these service add-ons. One of the services that many users will require is a degree of customisation during the implementation phase, or indeed later in the life of the system when additional functionality is required. Although many suppliers will advertise 'plug and play' systems, the reality is that every business environment is unique and some degree of configuration or customisation will usually be necessary if a system is to be optimised fully. You should clarify with your supplier whether customisation is part of the normal implementation process or whether extra costs will be involved.

Check the upgrade policy

If you buy a piece of hardware today it will be the same piece of hardware in three years' time unless you decide to add extra memory. Software is different. Whatever software you decide to go with will undergo gradual modifications over its lifetime. Some of these will be 'updates' – small (usually free as part of a maintenance agreement) changes that are downloaded regularly to ensure the software stays robust and secure. Every 18 months to two years, however, the supplier will come out with a largely new or upgraded version of the software which you will have the option of buying. More progressive suppliers tend to incorporate this into a standard agreement and in a hosted or SaaS

environment this is normally included as part of the subscription, so your system is kept fully up to date with the latest version at all times.

Although you may choose to skip one or more upgrades, eventually the version you are using will cease to be supported. So, before you commit to buying any product, you should ask the supplier about upgrade schedules and costs and find out how soon technical support is withdrawn from old versions. Also, avoid being roped into contracts that oblige you to upgrade.

Implementation approach

How your supplier plans to implement your new system is a key consideration because poorly planned and executed IT projects can take a big toll on any business. Ideally a supplier will appoint a dedicated project manager to steer the project to conclusion and act as a point of contact for your business and technical teams, but this is not always the case.

You should also ask about their approach to planning. How will they go about defining the scope of the project? Is there a specific data-gathering and specification process? Will they set key milestones and targets against which progress can be measured?

How will the project work in practice – how frequent will meetings be and will they be face-to-face or via conference call? Finally, what level of resource (numbers, skills and time) will be required from your side to make it all happen?

Data Migration

In the case of organisations who already have a legacy system or relevant data in spread sheets or other databases. How does your supplier plan to import this data? Most organisations will have built up a large amount of “useful” data over the years, which they would like to incorporate into the new system.

Look for suppliers with inbuilt data migration tools and are capable of importing it in a variety of different formats. In addition to this, you should

also ask yourself how accurate you believe your current records to be. The last thing you want is to start a new project, but be building on rocky foundations.

Training

In order to get maximum value from your new system you will need to ensure users are properly trained in it. Be sure to plan ahead rather than leave it to the last minute. Many suppliers offer training courses on how to use their product, either directly or through a partner training provider. Find out what services – either direct or indirect – they can offer.

Other questions to ask

- Is their training one-size-fits-all or do they offer differentiated courses to cater for different levels of user, for example, system administrator, supervisor, employee?
- Do they offer train-the-trainer courses to give you the capacity to train your own staff?
- What about refresher training – is that an option once employees have been using the system for a while?
- Finally, don't forget to include your in-house IT team in the discussion; they are likely to have a view on the training requirement and a good sense of what is needed.

Summary

Businesses today, now more than ever, realise the importance of operating efficiently. The who, when, where and doing what, needs to be measured effectively and this is where a comprehensive workforce management platform is invaluable. Companies get the tools and operating parameters they need, at every level to deploy resource plans and schedules effectively, while delivering top down management controls over wages or labour overhead, overtime, shifts, absence management and other major cost drivers in the operation.

Easily accessible knowledge of employee time results in faster decision-making, improved scheduling and better labour cost management, which makes companies more productive and competitive. Today's WFM solutions go beyond simple time and attendance functionality.

In summary, this document is not a buyers' guide to Workforce Management Systems or a sales brochure. It is simply intended to help you plan, research and evaluate the different

products and suppliers out there by asking the right questions at the right time. Taking a little time now to consider what your organisation might need, both in a Workforce Management system and in a supplier, could save you a lot of time and money further down the road. We wish you the very best of luck in your search.

Other Papers in this Series

- Softworks Top 10 Tips on how to successfully manage a Time & Attendance Project.
- Top tips on how to reduce absenteeism in your organisation.
- How efficiencies and consolidation could shave up to 5% off your payroll.

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