The HR Tech Consolidation Puzzle

What you need to consider for any consolidation project

roubler.

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Introduction

Consolidating HR, workforce management and payroll systems is one of the most significant things a business can do, not only to streamline business process and run more efficiently, but to reduce operational costs and free up resources to work on growing the business for greater profitability.

Our experience has shown us that the greatest success occurs when consolidation is undertaken after a straightforward but thorough planning process.

Roubler is built on a desire to help businesses consolidate disparate systems into one cloud-based platform, helping them pull all the pieces of the puzzle together as simply as possible. That's why we've developed this simple guide to help you in your planning by covering off all considerations (your puzzle pieces) before embarking on your consolidation project so it's as quick and easy as it should be.

Why should you consolidate?

Disparate software systems and processes that don't easily integrate will cause headaches, errors and compliance issues for any business. But there are so many other reasons to use a consolidated – or 'all-in-one' – workforce management and payroll system:

- Reduce operational and administrative burden from your business.
- Reduce unproductive wage costs associated with employee onboarding.
- Streamline compliance measures and processes across your business.
- Improve data consistency and flow throughout your business.
- Enable all staff to engage with a range of functions via an employee self service mobile application e.g. roster communication, payslip distribution, employee profile management and unavailability / leave management.
- Scale business operations without having to increase back office costs.
- Save money on multiple subscriptions and system maintenance costs.
- Provide greater data integrity and security.
- Future proof your business so that if a staff member leaves, the business can operate uninterrupted.

Alongside these reasons, we recommend setting your own long-term goals for consolidation that align with your HR strategy and business strategy. Taking the time to consider where your business aims to go – whether that's growth or stability – on an HR and wider business level will greatly guide you toward the systems you need to help you get there.

Tip: In addition to goals, take the time to sit down and write clear, SMART objectives (Specific, Measurable, Achievable, Relevant, Time-Specific) to keep your project on track. For example: "To achieve a 20% reduction in payroll processing times within 6 months of implementation of the consolidated system". **This clarity will give you focus and help you measure the success of your consolidation project later.**

What do you need to consolidate?

Before researching new software options or planning how you will consolidate, it's important to have a very clear idea of what you need to consolidate.

Completing a very simple systems audit will help you evaluate the good and bad of your current set up and allow you to identify what your business needs now and in the future.

System Audit Step 1:

Make a list of all your current systems and processes and what they are used for. You can then arrange them in a grid like the one below to map out which systems integrate with each other and which don't.

Current systems and integrations grid

	System 1 Name Purpose: Payroll Type: Online	**System 2 Name** Purpose: Rostering Type: Paper-based	**System 3 Name** Purpose: Onboarding Type: Online	**System 4 Name** Purpose: Time & Attendance Type: Paper-based
System 1 Name Purpose: Payroll Type: Online	N/A	✗	✓	Requires manual data transfer
System 2 Name Purpose: Rostering Type: Paper-based	✗	N/A	✗	✗
System 3 Name Purpose: Onboarding	✓	✗	N/A	✗
System 4 Name Purpose: Time & Attendance Type: Paper-based	Requires manual data transfer	✗	✗	N/A

System Audit Step 2:

Don't make assumptions about what needs to be consolidated. Get feedback from your staff about your current systems and processes. They are on the front line and therefore have the best knowledge of what works, what doesn't, what they like using, what functions they need to keep, and what is missing.

User experience is key to getting a consolidated workforce management system right, so it stands to reason that your staff (the users) are the best people to help you identify where the biggest problems are and where there are opportunities for greater automation and system improvement.

System Audit Step 3:

We recommend taking a good look at how much it is currently costing to run multiple systems with poor integrations.

Our simple Microsoft Excel Workforce Management Cost Calculator is a great way to do this and can be downloaded at www.roubler.com/workforce-management-cost-calculator.

With an idea of your current costs, you can then compare new systems and set a budget in place.

System Audit Step 4:

It's time to use the information you gained in the previous three steps to create a features list to help you evaluate new systems and options.

This list can be broken down into the following categories:

Features:

- Must-have
- Nice-to-have
- Non-essential

Integrations:

- Must-have
- Nice-to-have
- Non-essential

When creating this list keep in mind your workforce size and employment type, the number of employees who are responsible for each feature (e.g. do you have one payroll officer, or a payroll team?), and the amount of time it takes to complete workforce management tasks.

Once you have completed this system audit, you'll have a clear understanding of your current situation and what the best-case scenario is for your consolidation project. This will make searching for a new software system much easier.

TIP: Our guide* 'The HR Manager's Complete Guide to Purchasing HR Software' *will make the process of searching for a new system simple and painless. You can download a copy from: www.roubler.com/ebooks-guides/selecting-hr-software/

How will you consolidate your systems?

You can consolidate your existing systems and processes in two ways. Your choice will depend on your business goals, working environment and the audit you completed earlier.

1) **By replacing your current systems and processes with an all-in-one, or 'end-to-end' workforce management system like Roubler.** This type of system incorporates a range of functions from recruitment through to onboarding, rostering, time and attendance, leave management and payroll using one database. The benefit is that data doesn't need to be transferred from one system to another so data entry is eliminated, errors are reduced, and a significant amount of administration time is saved.

2) **Keeping those systems that work and complementing them with new technology that integrates seamlessly and reduces the number of processes you have.** This approach may give you the 'best of breed' of a range of workforce management features and reduce the number of systems you have to use, but you are not likely to receive the same benefits as consolidating into one platform.

Tip: Aim to consolidate and integrate as many programs as you can - if your technology stack doesn't seamlessly integrate and shave off hundreds of hours of work, it isn't slim enough.

Who will help you consolidate your systems?

Your HR technology consolidation project will require various skills and resources so it's time to take stock of what you have in-house and what you will need to outsource. You'll need to consider who can take care of:

- **Project management:** We recommend assigning a project lead to run your consolidation project. Larger organisations may wish to form a project team.
- **Data management:** This includes extracting data from the old system, migrating data to the new system, backing up data, cleaning the data if necessary.
- **Training:** This means either coordinating training on the new system with external trainers (usually from the system provider) or conducting sessions with staff themselves.
- **Supplier management:** This will usually be the project manager, but it's essential to have only one point of contact to work with the supplier throughout the project.
- **Stakeholder management:** The new system will be more readily adopted if there is a point of contact for questions and concerns, and if a communication plan is put in place.
- **Software implementation and testing:** this often requires a high level of technical knowledge and expertise and is often best handled by the software provider.

Outsourcing as many of these functions as possible will help you achieve a smoother, quicker transition to the new, consolidated system. Many software providers, such as Roubler, offer a fully-managed implementation process as part of their service.

TIP: When evaluating providers for your new consolidated HR, workforce management and payroll system, ask them what support they provide to customers for implementation, and research reviews from current/previous customers about their experience. You can find out about Roubler's customer onboarding process here: www.roubler.com/getting-started/

When will your consolidation project happen?

Timing is one of the tricker pieces of the puzzle to get in place. On one hand, the sooner you consolidate your systems, the sooner you'll reap the benefits. On the other, any change to your systems will require time to implement and can cause disruption to business as usual.

You'll need to consider the following:

- **What is your quietest time of year?** If possible, choose to migrate to a new system during a quiet period – you will be able to work through the implementation phase more quickly, your staff will be free to do training and adjust to new processes, and customer service is less likely to be affected.
- **When do your current software subscriptions expire?** By planning the system implementation to coincide with subscription expiration/renewal dates, you'll avoid paying fees for months where you aren't using the software.
- **Do you need a phased or 'all-in-one-go' approach?** An all-in-one-go approach gives you a fresh start and is a cleaner way to implement new software. It also ensures there is no confusion between when old and new processes should be used. A phased approach where you migrate one or two tasks at a time (e.g. rostering and T&A, then payroll, then onboarding) will take longer but may be necessary if subscription expiration dates don't align favourably.
- **When can training take place?** Training is one of the most important ways to ensure the successful adoption of your new system. You'll need to ensure you have adequate time allocated to train staff on the new system so plan around busy periods and months where there is likely to be a high number of employees on leave.

Conclusion

You may feel that consolidating your existing HR technology is a project that belongs in the 'too hard basket'. But taking the time to consider the why, what, how, who and when will make bringing together your HR, workforce management and payroll processes into one, cohesive system a straightforward and successful experience.

You may find the following resources useful:

Blog: Why less is more when it comes to workforce management & payroll technology
www.roubler.com/au/workforce-management-payroll-tech-stack/

Ebook: Maximising the Benefits of Automated HR
www.roubler.com/au/ebooks-guides/benefits-automated-hr/

Ebook: The HR Manager's Complete Guide to Purchasing HR Software'
www.roubler.com/au/ebooks-guides/selecting-hr-software/

The Power of One – Information on Roubler's on-system design
www.roubler.com/au/the-power-of-one/

About Roubler

Welcome to the future of workforce management. Our all-in-one HR and Payroll software consolidates multiple workforce management functions into one easy to use, cloud-based system.

All Roubler features, including onboarding, T&A, rostering and payroll are connected by a single data source enabling you to manage employee information and HR tasks across the entire employee lifecycle on one platform.

With an inbuilt Employee Self Service function available on iOS and Android, the information you need to onboard employees, create rosters, manage leave and run payroll is always up to date and ready to access wherever and whenever you need it.

> ***"The biggest thing is how much time it has freed up for me, where staff can onboard themselves and create their own unavailability which allows me to get out there and manage the business"***
>
> – Matt, Retail Store Manager, HG Retail

> ***"The payroll is quick, accurate, and award-compliant without me being involved. The staff and management have engaged with Roubler really quickly."***
>
> – Chris Jolliffe, General Manager & Licensee, Potts Point Hotel

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