How to...

Implement an
HR and Payroll system

The role of HR has changed dramatically in the last few years. Gone are the days when a job in HR might involve administering payroll and employee benefit schemes, or planning company outings. Today human resources professionals are more likely to be strategic partners to their commercial colleagues, tasked with leveraging human capital throughout the business.

Increasingly HR professionals are looking to integrated HR and Payroll solutions to help them capture and make better use of employee data, while reducing administration and driving a more strategic approach to people management.

Choosing a solution is only the beginning

Choosing a new HR and payroll solution and getting board approval for the purchase is only the beginning. You then need a successful implementation to ensure that you gain the planned benefits. The following guidelines are based on the extensive experience of Sage HR & Payroll working with many hundreds of customers over many years.

1. Reviewing how you currently do things

A new software system is the perfect opportunity to refresh how you do things. It provides you with the opportunity to see if there are better ways of doing things, improving processes and sharing information for example, that will make the HR function more efficient and effective. Now is the time to ask yourself, and your team, some searching questions:

- Do you have all the information you need easily to hand whenever you need it?
- Does the all information you keep comply with current employment laws, such as the Data Protection Act for example?
- What information about your employees is the most useful?
- What kind of management reports do you need?
- What processes could you automate to speed things up and increase accuracy?

A good supplier will make suggestions to ensure that even before the project starts, you know exactly what you will get out of it.

2. Creating your unique system

However good the solution you choose you may identify areas which don't fit your needs exactly. This may mean that you need some bespoke work done. Before committing to this route however you should:

- Take time to review your current processes to ensure that you are doing things in the best possible way, as it may be more efficient and less costly to change how you do things rather than customise your new solution
- Ensure that your supplier will commit to providing dedicated project managers and onsite developers so that you are assured of ongoing support for your customisation and to ensure that it can be upgraded alongside the rest of your solution
- If you are sure you need to go ahead make sure you understand the technical and functional specification documents that explain what the supplier is going to build for you
- Ensure that both you and your supplier have exactly the same idea about what you need
- Discuss the testing process with your supplier and if you are able to access a test system. So that you can review exactly what you are going to get, and to avoid spending more time and money trying to fix something that was poorly specified in the first place

Your supplier should take the time to understand your objectives and suggest ways to meet them without major customisation if possible, so be wary of committing to a major customisation unless it is absolutely necessary.

3. Getting ready for the roll out

If you are to ensure that you achieve exactly what you set out to you need to make sure that you and your supplier agree on a comprehensive and detailed project plan. This should:

- Highlight any areas of risk
- Make clear who has responsibility for doing what, so that you know exactly what is required of you and by when, and what you can expect from your supplier
- Ask your supplier for advice on the best way to manage the transfer of your data into your new system
- Include time for data downloads which can be time-consuming as data could be coming from multiple sources. It's an ideal opportunity to cleanse the data before implementing into a new system.
- Include a period of parallel running to ensure that everything is working before you switch over completely

4. Staged implementation

Implementing a system too quickly can be as problematic as it taking too long. You therefore need to ensure that:

- You have buy-in from the HR team, senior management, and others who will use the system
- If you have chosen a modular solution, introduce it in stages to avoid overwhelming people with too much information. Many people choose to begin with a standard personnel system and then build upon this to prevent changes happening too quickly
- You revisit your most urgent needs and install modules that will handle these needs first
- If you are introducing a 'workflow' tool to automatically deliver information via email, be careful not to bombard your staff - this could result in them feeling overloaded and lead them to ignore what they are sent
- If you have purchased an on-line tool to devolve some responsibility to line managers, think about how to engage them properly through internal marketing and training if necessary
- You consider having a specific brand identity for the software, a launch day, placing adverts on your intranet or making HR people available to offer advice on how to use it and the benefits it will deliver to individuals and the company
- Make sure you return to your initial aims once your system is fully implemented and ensure they have been met

5. Training

Training is one area where you simply cannot afford to cut corners. It is vital to make sure that both the HR team and employees buy in to the software so you get proper use out of it.

- To get the best out of your new system you to ensure that everyone adheres to new procedures rather than reverting back to old ways of doing things.
- You should make sure that your supplier provides you with adequate training manuals and online support so that you can make sure everyone has easy access to training materials when they need them
- It's also important to make sure that you have easy access to your supplier's help desk and that you are clear about the terms of your maintenance contract and the after purchase care you can expect
- It may also be useful to nominate an 'ambassador' to train new starters

It’s not over once it’s over

Finally, make sure you regularly review the system to make sure it meets your original objectives. This way you can easily identify any shortcomings that could cause disillusionment and lead to the system falling into disuse.

The more time and thought you put into the implementation and subsequent launch the more likely you are to achieve great things, but this is still only the start and both supplier and client need to work at it to keep the relationship going strong!

About us

Part of Sage UK, we have brought together the specialist experience and expertise of former competitors, Snowdrop (HR) and KCS Management Systems (Payroll), to deliver truly ‘best-of-breed’ HR and Payroll software and outsourcing services: a suite of integrated solutions that ease administration while encouraging a more proactive approach to the development and support of people.

Our product suite, SnowdropKCS, comprises award winning, powerful systems to manage the entire employee lifecycle, from candidate to leaver. Modular and scalable, our solutions are designed to meet our customers’ needs, both now and in the future. That’s why we deliver a full and extensive range of supportive services that are designed to give you everything you need throughout your time with us.

Whether project management, system training, helpdesk assistance or consultancy, you can rely on us to offer all the support you need, whenever you need it.

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