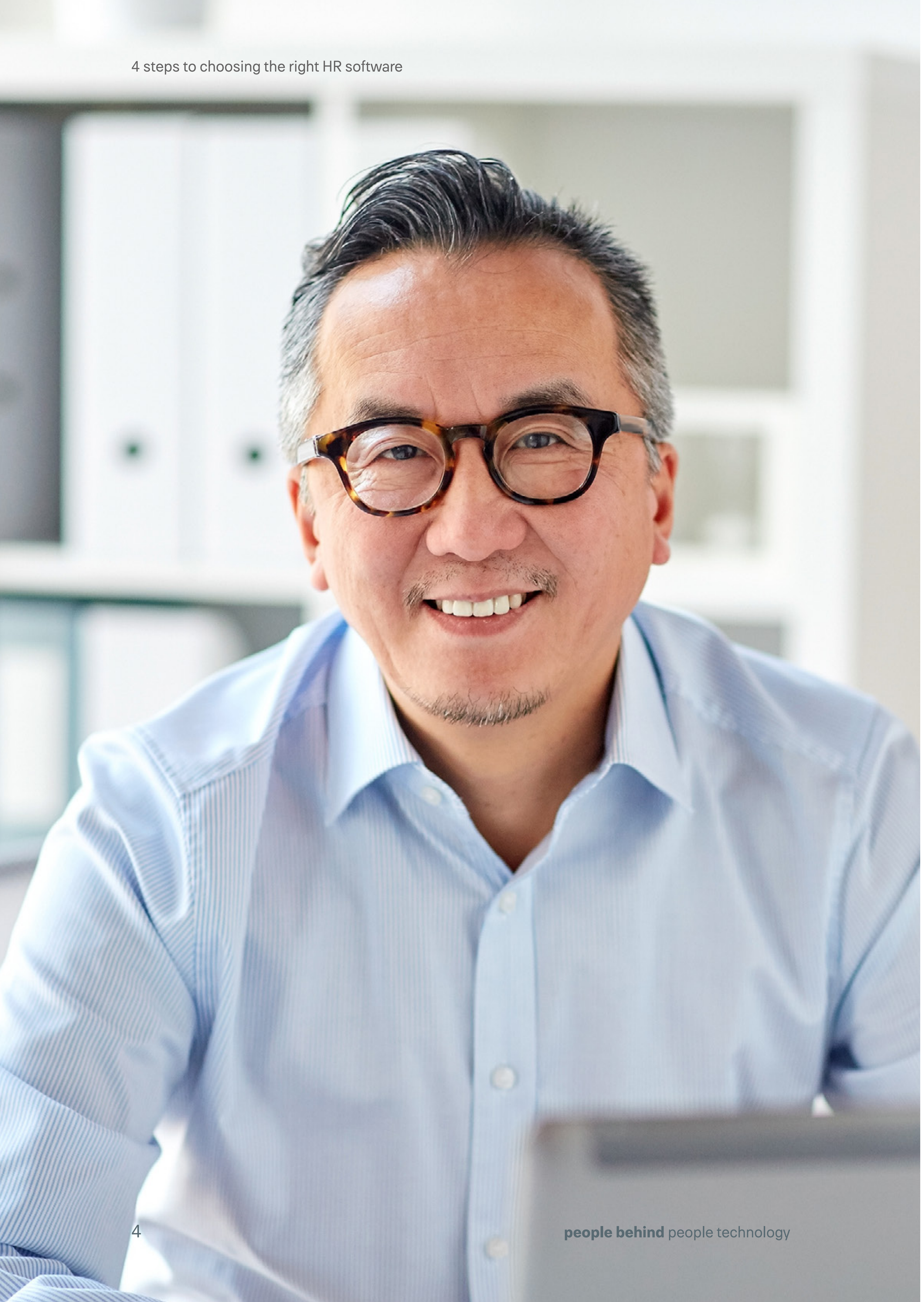
4 steps to choosing the right HR software

A buyer's guide

This guide was written by James Proctor, Director of Consulting and Services at Phase 3, an independent HR and payroll consulting and services provider that helps organisations implement and master HR and payroll software.

Contents



Ready to begin your search for some new HR software?

Finding the right HR software can revolutionise your HR department and business. It can help HR managers automate tasks, communicate with team members and gather actionable insights on employee satisfaction. This knowledge can then be used to reduce churn, improve morale and ultimately, make your business more money.

But finding the right HR software is a tricky process. It’s not something that can be done in an afternoon and it certainly shouldn’t be rushed. This is especially true if you’re not a tech-savvy individual.

If this sounds quite daunting, don’t worry. When it comes to selecting a new HR software the amount of technical knowledge you need to know is minimal. In fact, a large part of the process is leaning into the natural skills you have as a HR professional already.

You’ll be using your interview techniques, communication skills and project management brain to find the best software tool for your needs. You won’t need to look at a line of code.

In this guide, we’ll walk you through the steps you should follow to find the best HR software possible for your business. By using the accompanying worksheet you can finish each step with actionable insights tailored to your business. These steps will help you narrow down the right software for your company.

By taking a human led approach to this process you can work with your whole organisation to find the perfect software. A software that’ll turn the HR department from a reactive silo that fights fires in your business to one that’s proactive in driving culture, productivity and revenue.

Who are Phase 3?

Phase 3 is a HR technology consultancy. We provide businesses with impartial advice and guidance when it comes to the implementation, operation and maintenance of HR software.

We help companies master their HR systems and offer a range of services from core HR training and payroll services to HR software consultations and implementations.

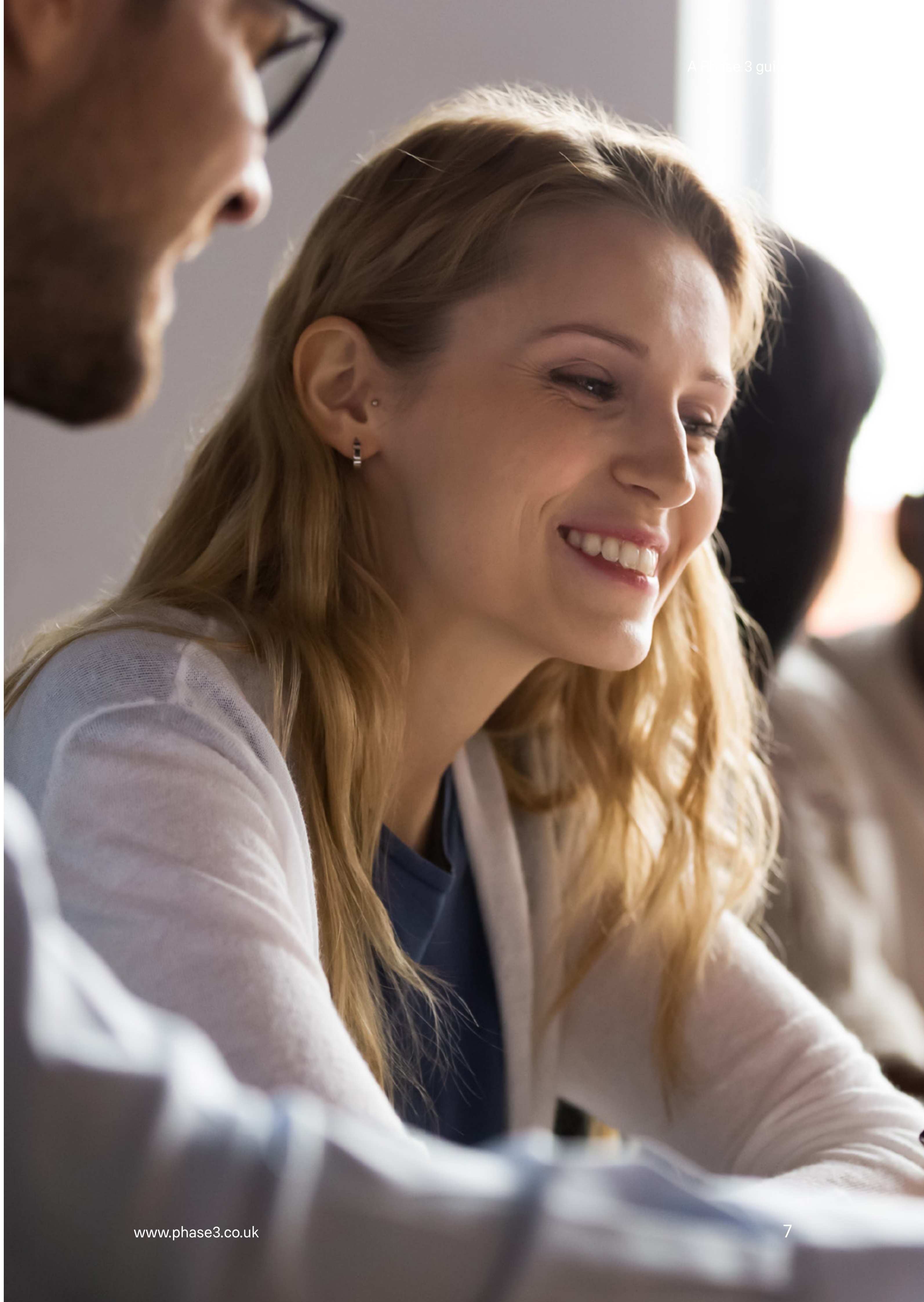
What sets us apart from other HR consultancies?

At Phase 3 our motto is “we are fiercely independent”. We don’t partner with any HR software platforms.

Our main focus is deeply understanding a client’s business goals, environment and culture. Our consultancy is led 100% by the specific problems a client is facing. We never take a one size fits all approach to consultancy and never champion one specific HR software solution over another.

For us, a business’s people, processes and culture will dictate what software (if any) we’d recommend to a HR team. This truly impartial approach allows us to get to the root of a company’s HR software problems and then fix them. We never enter a client’s office with a tool already decided and then try to fit a square peg into a round hole.

This approach also means you can be confident that this guide is designed to get you the best outcome for your HR team and business.



How to use this guide

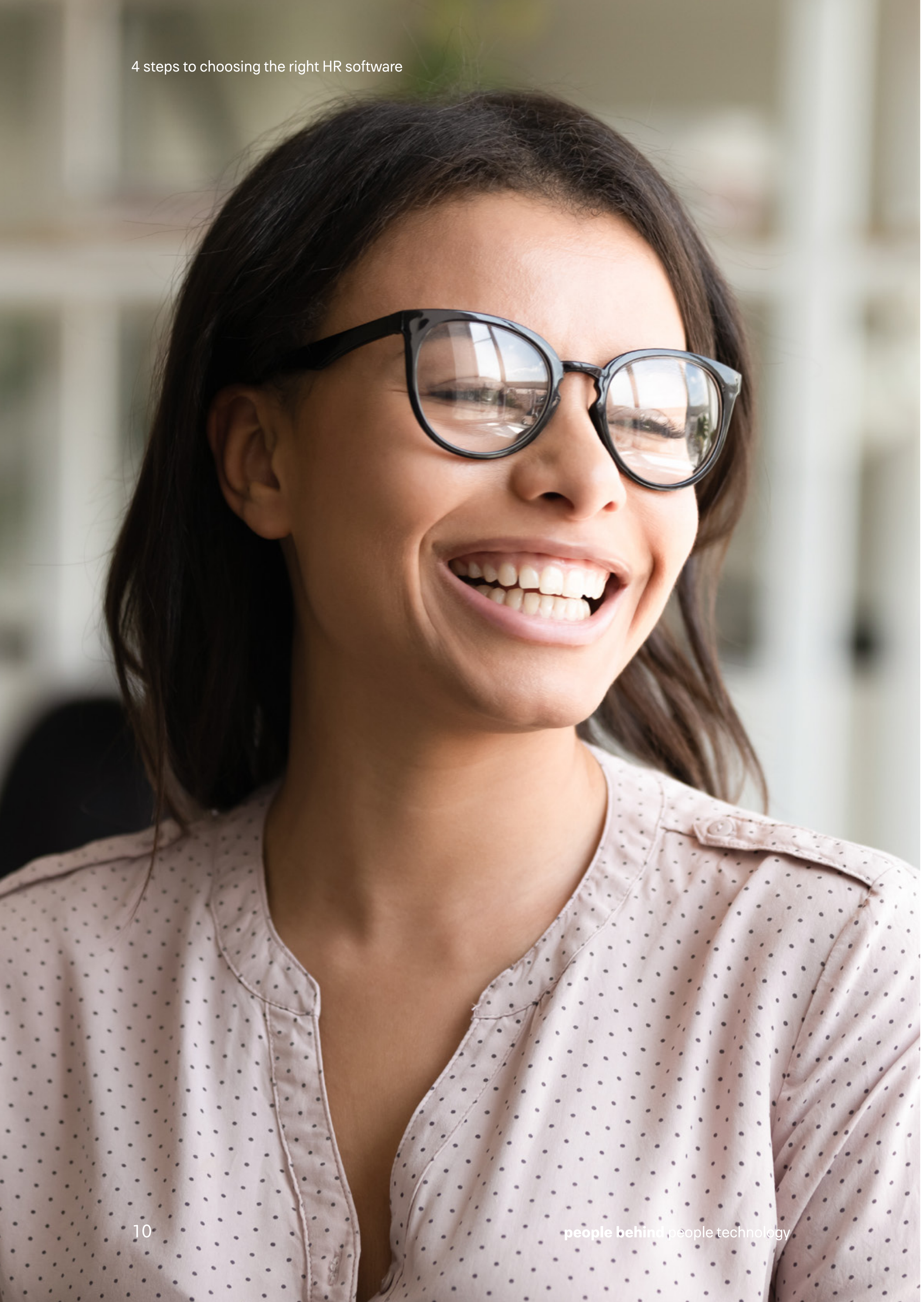
We've split this guide into 4 steps. Each step relates to one section of the attached worksheet. During each step we'll ask you to fill in the corresponding section.

As you go through the guide you'll see how the worksheet will help you define your business case for HR technology change. It'll let you map product features to the business goals you'd like to achieve with some new HR software, it will help you shortlist the suppliers you'd like to invite to tender and give you a way to compare and rank these suppliers.

You can find the worksheet at the back of this guide.

Here's an example of a blank worksheet.

STEP 1	STEP 2	STEP 3					STEP 4
Business Case What are the reason for change?	**What product features will facilitate this change?**						



Step 1 - Building your business case for HR change

So, you'd like to invest in some new HR software. Purchasing anything new is exciting, especially if it helps improve your job and company.

But in this excitement a vital step in the buying process can be overlooked. This could leave you tied into a HR SaaS product you don't like.

Once you've settled on investing in some new HR tech it's important to take a step back from that decision and let it sink in. You should critically evaluate the business case for purchasing some new software and present that to your peers and company leadership team **before** you start the buying process.

This isn't just a box ticking exercise for your finance department. It's an opportunity for you to get "under the hood" of your HR processes and critically examine how you can improve them.

Creating a strong business case for a new piece of HR software will help you do two things:

1. It gives you the best chance of achieving the desired outcome for your HR team aka getting some new software.
2. It'll give you much greater clarity on what you want your HR software to do before you even start looking. This will make the process of selecting a tool so much easier.

At the end of this step, we'll fill in the first section of our worksheet and list 3 to 5 reasons for change we'll present in our business case. Doing this first will give you several concrete business problems you want to overcome with HR software. Once you know what these business problems are you can make a list of software features that'll help you solve your reasons for change.

How to build a business case for HR software

Once you're ready to change your HR software you can start making the business case for a new product.

The goal of this step is to identify 3 to 5 reasons to change your current HR software. Follow the points below and think about each section deeply. These are open discovery questions you need to ask yourself and your team. Your goal here is to tease out the positive impacts a new HR software will have on your business.

Your reason for change should be formatted in three parts:

Your Limitation + Why it's an Issue + Your Solution

For example:

Your Limitation

Our current HR software only allows 5 active users on the platform at any given time.

Why it's an Issue

This reduces productivity as staff have to wait to access the software.

Your Solution

A new HR software tool with unlimited logins will increase productivity and reduce employee frustration.

Go through the numbered points on the next page alone and with your peers; and start to think about your reasons for change. When you get to the end of this section you will have a clear understanding of the main reasons you need some new HR software and the positive impacts that change will have on your business.

You can then fill in the first section of the worksheet at the back of this guide.

KEY QUESTION

Why 3 to 5 reasons for change?

If you only have 1 it can be difficult to get leadership to commit to a new product. After all, no SaaS platform is 100% perfect, sometimes we have to work around annoying limitations in products. That's just part of running a business.

Any more than 5 issues can feel like you're either moaning about a platform you just don't like or, more importantly, you can't pin down a tangible, impactful reason why you want to change your software. Too many points can lead to a lack of clarity and your leadership team won't commit to a project when they can't understand the benefits.

Sticking to 3 to 5 reasons to change your HR software gives internal stakeholders clarity on what you want and why and gives you the best chance to communicate your business case for change without getting lost in the details.

1. Get an overview of the business case

In the very broadest sense why do you think you have a case for change? What factors are driving your desire for change? Do you feel your current software is reaching its limitations? Is it outdated? Do you feel you'd be more productive if you switched to another HR software? Ask yourself why you'd think that.

This can be done individually, within your HR team, or company-wide. We'd suggest doing all three. Think about why you get frustrated with your current HR tool and what that means for your business as a whole.

If you have uncovered any really strong reasons for change from this process write them down on your worksheet now.

2. Look at your options, can this be solved internally

Once you've identified your reasons for change you then need to review the HR software market. You need to gauge the likelihood of finding a product that can satisfy your business case.

What do we mean by this?

Building a business case isn't just about proving you have a legitimate reason to replace your software. It's also about proving to leadership, finance and yourself that there are products out there that can do all the things you want a new platform to do.

There's no point creating a compelling business case for a new HR software if there are no suppliers in the market that can satisfy your reasons for change. It'd be a waste of time and resources.

This step doesn't require you to do a deep dive into all the products on the market (that's for step two). All you're doing here is looking at the options available to you.

Are there enough companies out there for you to do some comparative research? Are you giving yourself enough options?

What about your current software?

Don't forget to look at your current HR software too. Are you really getting the most out of it? Check it against the business case you're making. Quite often a supplier can add features or upgrade your current software and that could satisfy your reasons for change.

It can be easy to write off your current software (after all you have decided to look for a new one) but make sure you do this step. It could save you a lot of time, money and effort if you realise your current platform is fit for purpose.

Validating the market

Make sure you look at the HR software market before you make your business case. If you can prove there's a viable alternative to your current product then getting buy-in from leadership will be much easier.

Has this section highlighted any other reasons for change you haven't thought of yet? Write them in your worksheet now.

3. Analyse your risk vs reward

What are the potential risks to your business if you decide to use some new HR software? What rewards will your business gain? Will you save a lot of money or become a more productive team?

When building the business case for new HR software the last major thing you need to think about is the associated risks and rewards.

Risks

Examples of risks could be: confusion and slow uptake of a new HR system by staff, long term disruption to your business as a new tool is onboarded, and internal pushback from staff who are wary of new systems.

When presenting the risks in your business case it's important to be transparent and honest about them. Trying to hide or downplay risks in the hopes of getting buy-in from leadership could lead to a lot of trouble for you further down the line.

Rewards

Rewards shouldn't be confused with product features. In this case rewards are things like: improved productivity across your company, amount of money saved or the removal of communication barriers between HR and other departments.

When you're mentioning the rewards a new HR software could bring to your company, be very careful to be realistic. It's easy to promise the world when you're excited about a new tool or product. But expectation management is a big part of the business case. Not just for the leadership team but for you too.

When writing your reasons for change it's important to keep in mind risk and reward. Don't downplay the former and over-egg the latter. Make sure all your reasons for change are realistic and achievable.

Take the time now to look back over any reasons for change you've thought of already. Are the risks mentioned? Are the rewards realistic?

Fill in section 1 of your worksheet

You've probably been filling in your reasons for change on the worksheet whilst completing this step but it's also worth taking the time now to review the whole section. Speak with peers and other departments in your company too. Can they add any more reasons for change to the ones you have already?

Once you're happy with the reasons for change you've found you can then present them as points in your business case for new HR software.

Presenting your business case for new HR software

If you want to convince internal stakeholders of the value of some new HR software, getting across the **why** of the project is the most important thing you need to do.

You can talk about product features all day long, but you'll get no buy in from your leadership team unless you show them how these features will positively impact their roles.

At Phase 3 we think the key to presenting a successful business case lies in the three R's. Being relevant, realistic and real:

- **Relevant -** What real world impacts will this technology have on the entire business. Don't chat about features, link the software to the macro goals of your company.
- **Realistic -** Don't fudge your numbers or downplay risks. Be honest and transparent and manage expectations well.
- **Real -** Ground your business case in reality. How will this change processes day-to-day "in the real world"? How will your office change?

Refer to your worksheet here. The reasons for change you've mentioned in the first section should all be relevant, realistic and real. Use your reasons for change as the main bullet points in your business case. By constructing them in the way we've outlined in this guide you can't stray far from the 3 R's.

Key takeaway from this step

The business case isn't just for your finance decision makers - it's an important first step in understanding what you want your new software to do. Knowing this means you can critically analyse the tools on the market to find the right one to solve your specific business problems.

Relevant, realistic and real reasons for change will guide the rest of your buying process. You'll refer back to your business case and reasons for change in the next steps of this process.

At the end of this step your worksheet should look like this:

STEP 1	STEP 2	STEP 3					
Business Case What are the reason for change?	**What product features will facilitate this change?**	BrightHR	bamboHR	Itrent	CoreHR	HR4eva	STEP 4
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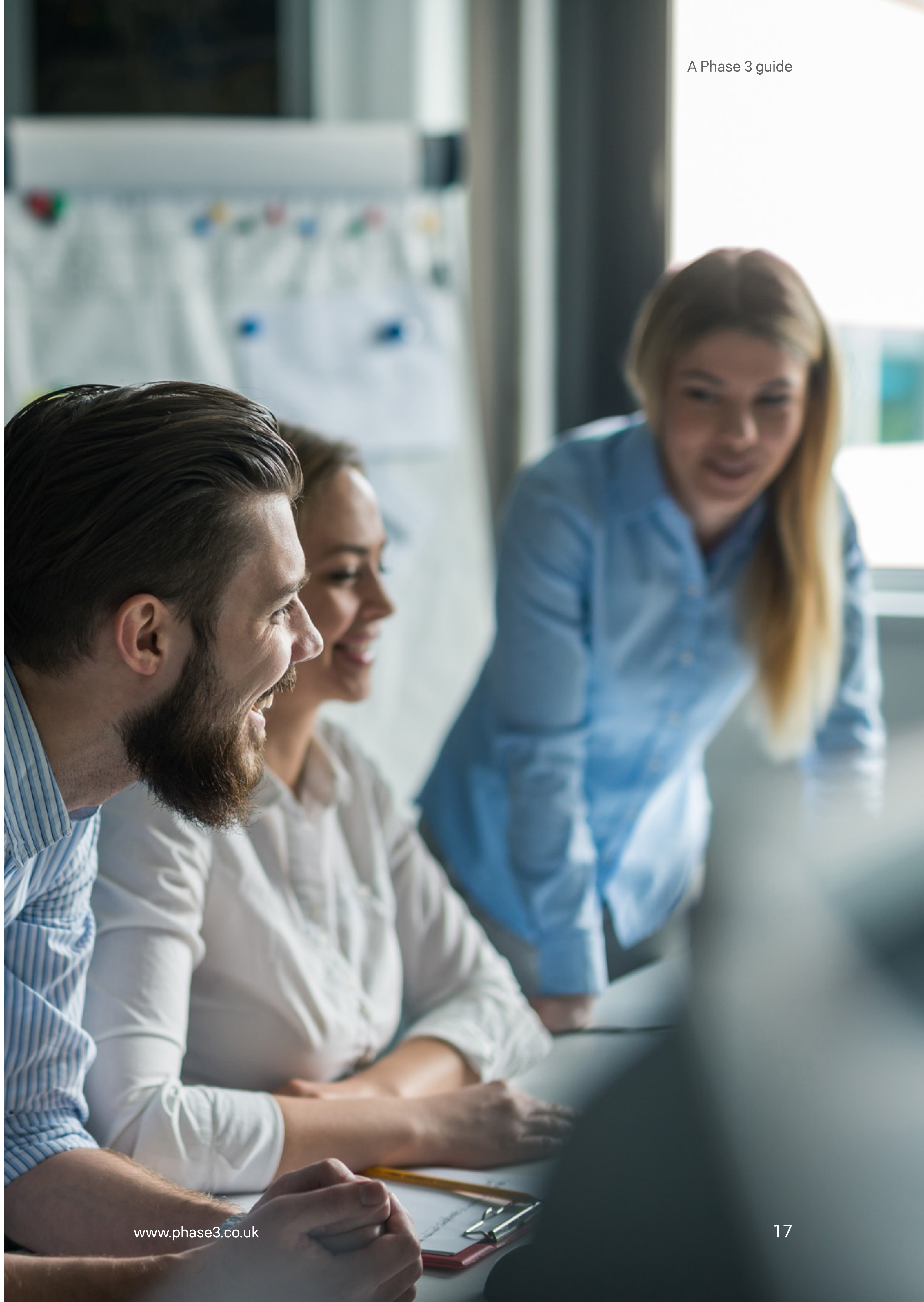
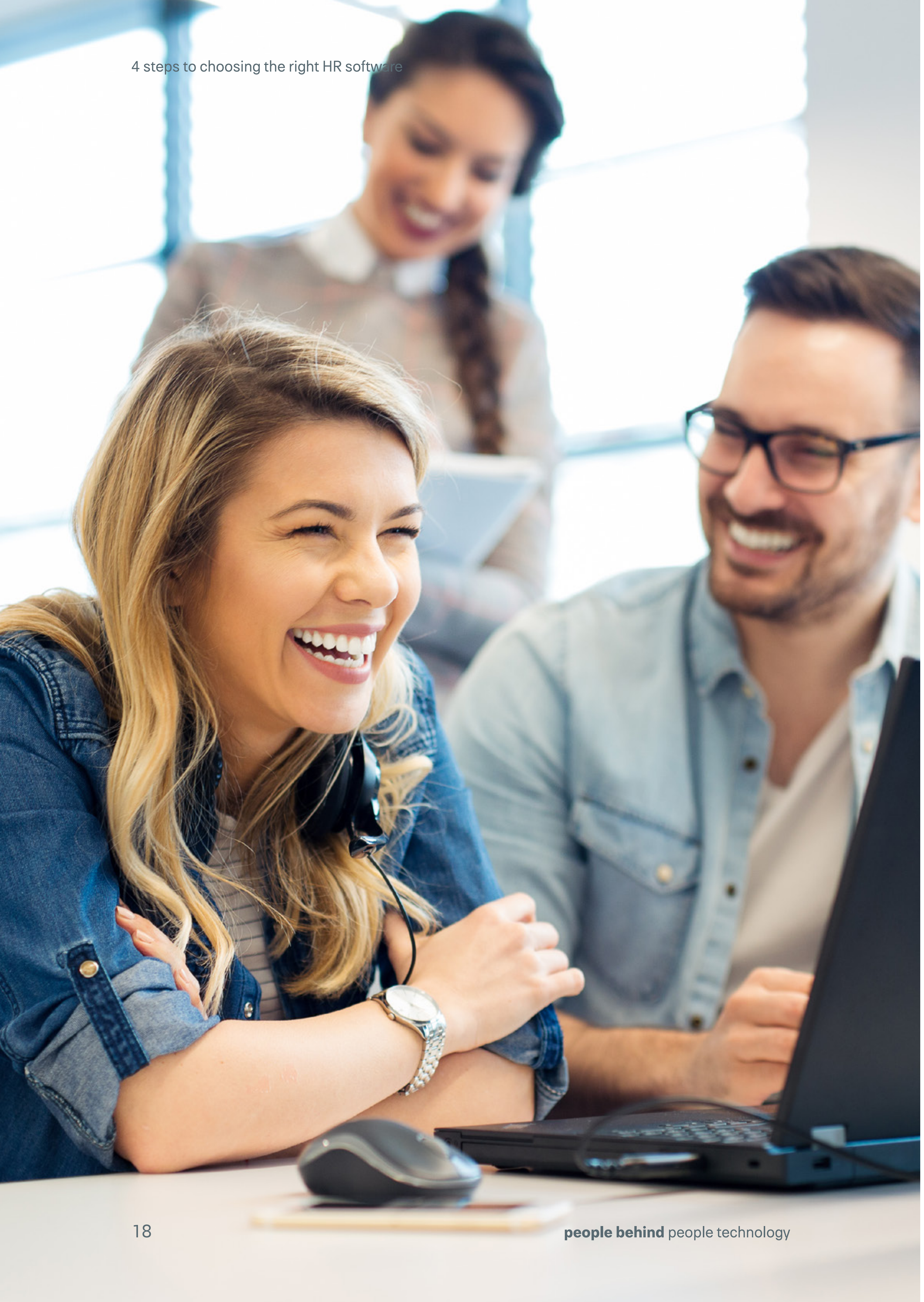
Our current systems doesn't automatically email staff their monthly payslips, we need to give them out manually at the end of the month. This is an archaic procidure and improving it would save 4 hours of HR time a month.							





Step 2 - Creating a shortlist of HR software requirements

Once you've proven your business case it can be easy to rush straight to product demos. You know why you need some new software, so what's left to do but pick one?

Well, quite a lot actually. Before you head out to suppliers you need to have a list of product features ready. You need to know what you're looking for when you trial some new software.

In this step of the buyer's guide we'll be filling in the second section of the accompanying worksheet.

We're going to be taking the reasons for change you've identified in the last step and creating a list of product features that will help solve each one. Using the worksheet we'll map each feature to a specific reason for change.

Doing this means the features you identify as desirable in a new HR software platform will directly help you satisfy the reasons for change you presented to your leadership team.

This will give you a strong idea of what "good" looks like when you're inviting suppliers to tender. It can help during the tough decision making process of selecting a tool and it can give you clarity when you're being bombarded with product features.

How do we decide which features are important for us?

This is the research phase of choosing some new HR software and can be split into two parts. The internal searching and the external research.

Just like the previous step, these two parts should be approached as an open, collaborative discussion with peers. In each part, think about the types of features you'd like in a new piece of HR software and how those features can help solve your reasons for change.

Part 1: Internal Searching

This part is about figuring out what level of complexity you're comfortable dealing with in a HR software. There are loads of different tools on the market, some favour ease of use over niche features. Others are designed for tech-savvy HR teams who want increased customizability.

There's no right and wrong answer to this part. You need to decide what level of software is right for you and your business. When thinking about this the questions below are good starting points:

- What's the internal structure of your company?
- What are your future plans?
- How tech-savvy is your workforce?
- What size is your company?
- How fast are you growing?
- Where are you based?
- What's your company's appetite for risk?
- What position do you occupy in your company?
- Where does the HR team sit within your company?
- How easy is it for you to affect change in your company?
- Do you enjoy working with technology?

Why is this important?

There's no point investing in HR software you don't understand. Even if a product solves all your reasons for change, if it's not a good fit for your company it won't be adopted by your colleagues.

Understanding the level of complexity you're comfortable with at this step also has another benefit. It means you'll only research products, and therefore product features, your business will adopt.

There is no point drawing up a list of features if they're only available in HR software that's beyond your comfort-zone, both as an individual and a business. If you do this one of the following will happen:

1. You'll end up investing in an HR software you aren't comfortable using because you've selected a tool which has product features you can't use.
2. You'll create a list of features you want from a new piece of HR software, but you won't be able to find a product that has them because you're looking at products not suited to your level of complexity

This exercise won't directly decide the features you map to your reasons for change, but it will show you which features are ones you shouldn't worry about. When you know which features to ignore, selecting the ones that'll have the most impact on your business becomes easier.

Part 2: External Research

Once you've done your internal searching you'll have a greater understanding of the types of HR software you'd like to work with. You can now start evaluating the features those products have.

Find 3 to 5 HR softwares you like based on the considerations above and begin to list their features.

If you're feeling confident you can start doing this in step 2 of your worksheet. Just make sure you're aligning the features with the reasons for change they'll help solve.

At every stage of this process you should be thinking "how will this feature help me solve one of my reasons for change?"

Is it relevant to the problems I want to solve with some new HR software?

We've listed some examples of things you should consider when reviewing software features:

- What does it look like?
- Does it have good UX?
- What modules does it have?
- What's the functionality?
- Will it have to be configured with payroll or a T&A system?
- Will it integrate with other systems?
- Will it have mobile compatibility and have self service?

Research each software and write a list of features they have that will help solve your reasons for change. If a feature is present in two different softwares make a note of that. Likewise, if one feature can solve two reasons for change then you know that's an important feature.

By doing this you can create a hierarchy of features from the most important to the least important. You may also discover some must-have features for your new software platform you hadn't even considered before.

Once you've done this exercise you'll be left with a list of HR software features ranked by importance and selected based on your reasons for change.

Fill in step 2: Mapping your HR software requirements to your reasons for change

You can now take a look at your desired features list and fill in step 2 of your worksheet. Mapping out your list of product features against your reasons for change means your search for a new HR software will be dictated by achieving your business case.

Not only will leadership love to see this methodology, but it can give you peace of mind as you know the features you're prioritising will be the ones most likely to lead to positive improvements across your business.

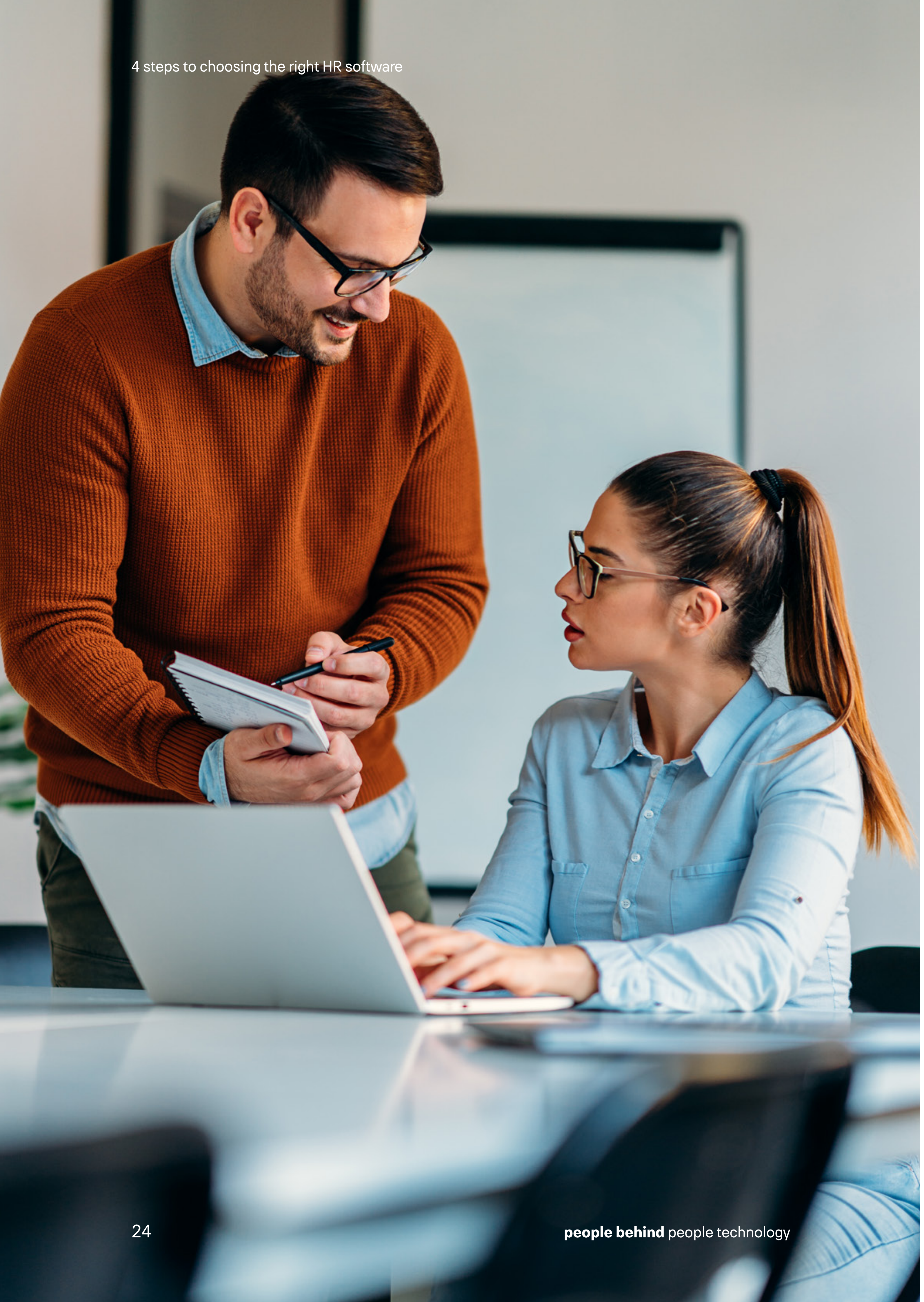
In case you were wondering, your worksheet should look something like this now.

STEP 1	STEP 2	STEP 3					STEP 4
Business Case What are the reason for change?	**What product features will facilitate this change?**						
Our current plafrom only allows 5 active users at one time. This is leading to inefficancy as our HR team cannot all be online at the same time. A new piece of HR software, that has unlimited users will let us become a more efficant team and save us time.	A software tool with unlimited users A software tool that signs our users after a period of inactivity						
Our current platform does not allow staff to manually request holidays. They have to come to us to put a request in. This taks, while not super time consuming can break HR conventration and lead to lost work time for both the HR team member and the member of staff. A new HR tool that allows staff to automatically request holidays from their desks would free up both staff members time.	A staff portal A software tool with unlimited users A mobile friendly platform so staff can request holiday where ever they are						
Our current systems doesn't automatically email staff their monthly payslips, we need to give them out manually at the end of the month. This is an archaic procidure and improving it would save 4 hours of HR time a month.	Automated email outreach system Easily editable staff data fields An API that links to the company's mail provider						

Key takeaway from this step

Step 2 is the research phase of this project. It's about identifying HR software you and your business will be comfortable using and then researching what features those products have.

Making sure a new HR software helps solve your reasons for change is crucial for success in this step. By bringing every product feature back to those you can be confident that any new HR software you onboard will provide a positive benefit to your business.



Step 3 - Short-listing suppliers

Now that you have a list of desired features for your new HR software tool you need to create a short-list of suppliers to outreach and request a demo of their products.

This stage shouldn't take you too long as you've probably got a good indication of who you'll invite to tender based on the research you did in the previous step.

That being said, this is still an important job and one you shouldn't rush. The companies you were using as the basis of your research might look professional, but until you do your due-diligence and look up the reputation and ethos of each company you can never be sure whether they'll be the right supplier for you.

This is where you should dig into each potential software supplier to see if there's any red flags that could change your opinion of them and make you decide against using them.

Have a look at company reviews, check their website to see what their support resources look like. Do they have a chat bot? What's their reputation like with your peers? Ask other HR professionals what their experiances have been like. And most importantly, check their security policy?

Make sure you do this before you create your short list of suppliers. It might seem like a small thing but double checking the credibility of your shortlist now could save you a lot of headache in the long run.

When you're happy with your list of suppliers you can fill in step 3 of your worksheet.

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	Easily editable staff data fields					
	An API that links to the company's mail provider					

STEP 4

Step 4 - Navigating the beauty parades

It's here, the time has finally come, you're about to invite some suppliers into the office to show you their HR software. This is the most exciting part of the buying process. You get to see all the hard work and research you've done come to life in front of you.

A word of caution is needed however, in all the excitement and flashy presentations (we call them beauty parades for a reason) it can be easy to lose sight of your business case and reasons for change. Don't get drawn into the sales pitch, keep a cool head and stay focused on why you actually need some new HR software.

Thankfully, since you've been following along with this guide, you've turned your worksheet into a HR software scorecard.

How you score the suppliers is up to you but once you've seen them all you'll have a completed score table. That'll let you compare suppliers against each other and help you make an informed decision on which is the best for you.

In this step we'll go through the beauty parade process and mention some of the pitfalls and things you should look out for when inviting suppliers to tender.

Who should run this step?

Inviting several suppliers into your office to demo their products can be a logistical challenge. Even before they arrive at the door there's a lot to do. You need to align with several internal teams (finance, IT, sales etc) before sitting down to watch a presentation.

Keeping a well-organised calendar and regular communication between departments is the best way to make this process go smoothly. A HR manager or project manager is the best person to run this step. The 4 main tasks for this step are listed below and we'll go into each one in more detail in this part of the guide.

- Pre-selection and requirement analysis
- The Tender Process
- Product Demonstrations
- Decision making and due-diligence

Pre-selection and requirement analysis

Before you invite suppliers into the office it's wise to sync up with other internal departments. This lets you align on the features and requirements you'll be looking for in a HR software.

You've already created a list of desired features in step 2 of this guide. This is a great time to show that list to your internal stakeholders. Maybe there are other features they want to add or perhaps they've noticed an issue in your shortlist you've overlooked.

This last minute check is a great way to get the whole company aligned on what exactly you're looking for in a HR software.

Phase 3 recommends getting some help from an external consultancy for this. Most people will swap HR software's once or twice in their careers, but it's a very important transition. By seeking external help you can have a professional facilitate this discussion. This gives you absolute clarity over what you're looking for when a supplier demos a product for you.

Take pre-selection and requirement analysis as one final check over all of your desired software features. Decide for yourself again what features are essential for your organisation, what are nice to have and what can you do without?

The Tender Process

This is where you invite your shortlist of suppliers into the office to show you their product. Depending on the size of your company this is something you can do yourself or send out to your procurement department.

The process normally starts with an invitation to tender or a request for a quotation. These can be sent out via email or you can call the companies. If you've used this guide's accompanying worksheet you'll already know who you're going to invite to tender.

Some companies will simply put a post on LinkedIn or their blog inviting companies to pitch their services to them. You can also use Phase 3's onsite systems selection tool if you're struggling to decide which suppliers you'd like to invite to tender.

Once all the invites are sent out, all that's left for you to do is manage the meetings and review each product on the day of their demo.

Product Demonstrations aka the beauty parades

This is hands down the most exciting part of the buying process. But also the one that has the greatest chance of derailing all the hard work you've put into the project so far.

It can be easy to get swept off your feet by a flashy presentation or charismatic sales person. They might champion features you aren't bothered about, but the more you listen to them the more they sound appealing. Don't get derailed! Stick to the features you've identified in your worksheet and use them to guide your decision making.

Don't forget that you're in a sales presentation and the person showing you this product wants your business! You don't need to be super mistrustful, just be aware that you're getting a very managed view of the product.

Below we've highlighted some key considerations and actions you can do before and after each product demo to make sure you stay in control and get the most out of them.

How to get the most out of a product demo - PHIM

PHIM is an easy way to remember the things you should do to get the most out of any product demo. PHIM stands for prepare - help - invite - manage.

By doing these 4 things you can guarantee you'll watch product demos that are useful, insightful and give you a clear understanding of whether a HR software will be right for your business.

Prepare

This doesn't mean writing down a few questions before your meeting. You're preparing the supplier for the demo just as much as you're preparing yourself.

Send them your list of desired features and let them know which of your processes you want to automate. Tell them about your current HR software, its limitations and why they annoy you. Let them know what business problems you aim to solve with a new HR software product.

Preparing the suppliers this way before they arrive means you can cut out unnecessary waffle and get down to seeing the features that'll improve your business.

Help

Salespeople are humans too and you'll never get far in a product demo if you treat it like a grilling. Send your sales rep a list of things you'd like them to demonstrate and tell them how those features will improve your business.

Maybe send them a real-life problem you've encountered and ask them to solve it with their software. This will keep the sales rep on course when showing you their product and lets you get a first-hand look at the features that matter the most to you.

Invite

Don't sit through a product demo on your own. Make sure you bring a good cross section of your company into each demo. Get their opinions and let them ask questions. They may uncover something you've missed during your research.

If not enough internal stakeholders are present in the demos it can be difficult to make sure all the departments questions regarding the software are answered.

If you have too many people in the demo, you won't be able to cover all your agenda points and it might descend into an unmanageable conversion.

Manage

Be mindful of your own excitement and expectations. Stick to an agenda, use your worksheet and don't get suckered into new shiny features. Take notes and talk about the product after with your peers.

Important things to remember during a product demo

- You're in a sales presentation (yes we mentioned it before but we can't stress it enough). The sales rep will love to show you the platform's shiny new features but might fail to grasp your specific needs for their HR platform. This can lead to a pointless demo where you're shown amazing features but things that have little relevance to your business. Don't let that happen, help the sales rep.
- The person giving you the product demo isn't likely to be the same person who'll be responsible for your post-sale support and software onboarding. So make sure you ask them about those parts of their business too.
- Double check what the sales rep is showing you is the actual product. We've had cases before where sales reps have shown clients slideshows with pictures of what the product will look like. Get them to log into the actual system and give you an in person tour.
- Take note when a sales rep is touting features that are on their product roadmap. These aren't live yet and might not be for a while. So be sure to press them on what functionality the product has right now.

What to do before and after a product demo

Before and after any product demo, make sure you have a small workshop with everyone who'll be in the presentation.

Before the meeting, align on what you want the software to do, mention any doubts you have about the product and make sure you know what each person really wants to see from the demo.

After the meeting, discuss whether the product satisfied your expectations, if you had doubts were they confirmed or put to rest? Did you use your worksheet as a scorecard? What marks did you give the software? How does it stand up against other products you've demoed?

Always go for a second viewing

If you really like a HR software product then don't be afraid to ask the sales rep to come in for a second viewing. Checking the product out again let's you confirm your original feelings about it and can help you decide if you're torn between two software solutions.

Super important

If the demo doesn't deliver for you, **never** assume it will when it goes live!

Filling in the last step of your worksheet

Unlike the other steps in this guide, you'll fill in this part of your worksheet as you go through the beauty parades. You can fill in each requirement with a simple yes or no, or you can grade each HR software out of 10 based on the features you've selected.

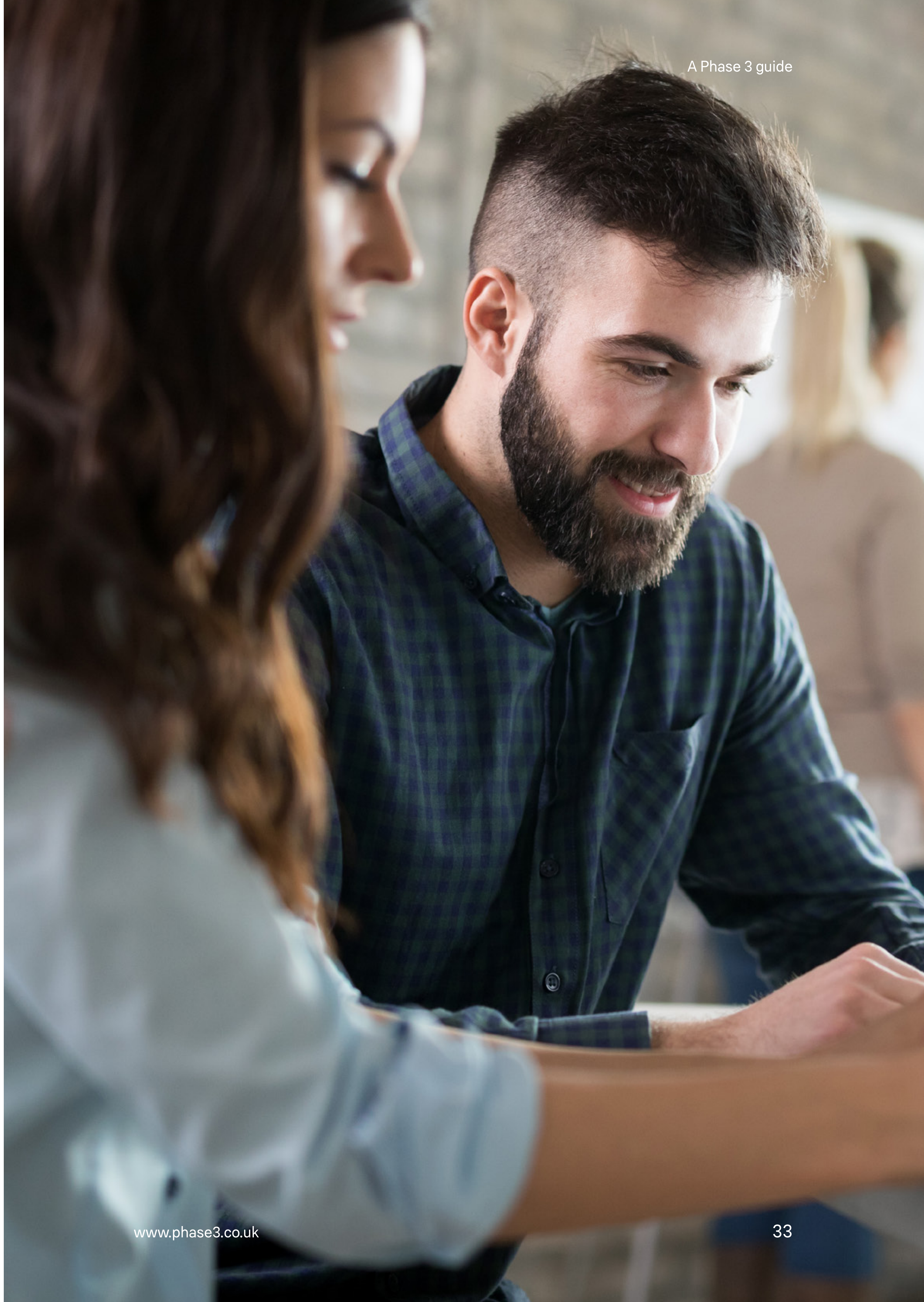
Keep your worksheet with you when you're in a product demo and make copies for the rest of your team. Let them use the worksheet too and you can compare notes after each demo.

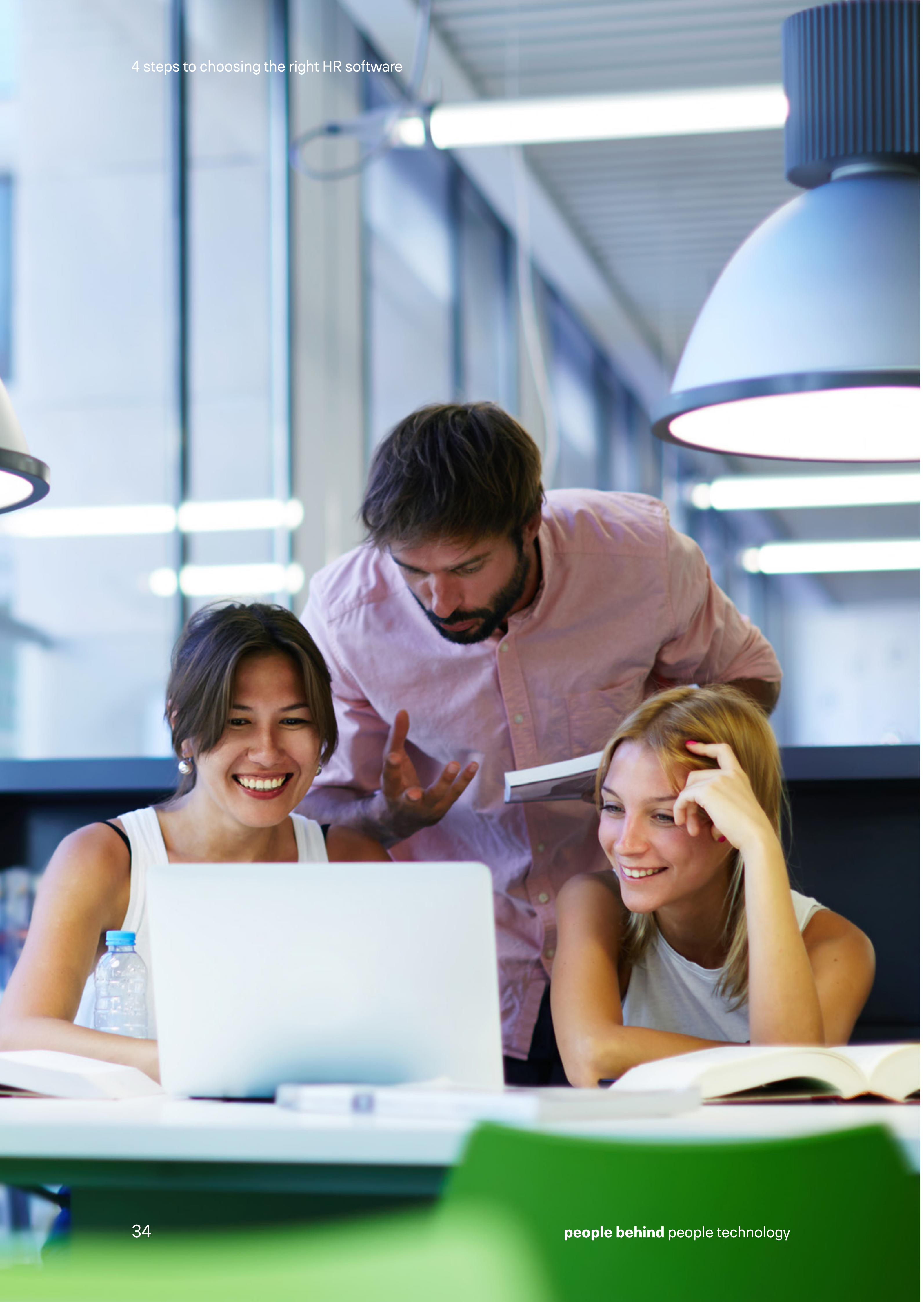
Viewing a string of HR products can be exhausting as well as exhilarating and after your third demo you can start to lose sight of the reasons you wanted some new HR software in the first place.

Use your worksheet as a steadying presence and a reminder of which features you're looking out for.

Once you've finished your worksheet, you should be left with a completed score card like the one below:

STEP 1	STEP 2	STEP 3					STEP 4
Business Case What are the reason for change?	**What product features will facilitate this change?**	BrightHR	bamboHR	Itrent	CoreHR	HR4eva	
Our current plafrom only allows 5 active users at one time. This is leading to inefficancy as our HR team cannot all be online at the same time. A new piece of HR software, that has unlimited users will let us become a more efficant team and save us time.	A software tool with unlimited users	4	5	8	8	3	
	A software tool that signs our users after a period of inactivity	8	8	7	6	9	
Our current platform does not allow staff to manually request holidays. They have to come to us to put a request in. This taks, while not super time consuming can break HR conventration and lead to lost work time for both the HR team member and the member of staff. A new HR tool that allows staff to automatically request holidays from their desks would free up both staff members time.	A staff portal	3	3	5	6	6	
	A software tool with unlimited users	2	2	6	7	8	
	A mobile friendly platform so staff can request holiday where ever they are	5	5	6	7	8	
Our current systems doesn't automatically email staff their monthly payslips, we need to give them out manually at the end of the month. This is an archaic procidure and improving it would save 4 hours of HR time a month.	Automated email outreach system	2	3	5	7	8	
	Easily editable staff data fields	9	9	9	9	9	
	An API that links to the company's mail provider	3	4	5	5	5	





Ready to buy?

Now that you've gone through all the steps in this guide and you've completed the worksheet, you should have decided which HR software product is right for you. You can make a verbal agreement to buy with the successful sales rep and begin the process of purchasing the product.

Even after researching the company in step 3 it's sensible to do your due diligence again and check out the company's reviews to make sure you are comfortable working with them.

Seek out their current customers and ask them how they found the onboarding process. It's a good idea to speak to one company that's just started their HR transformation journey and another that's used the software for a couple of years.

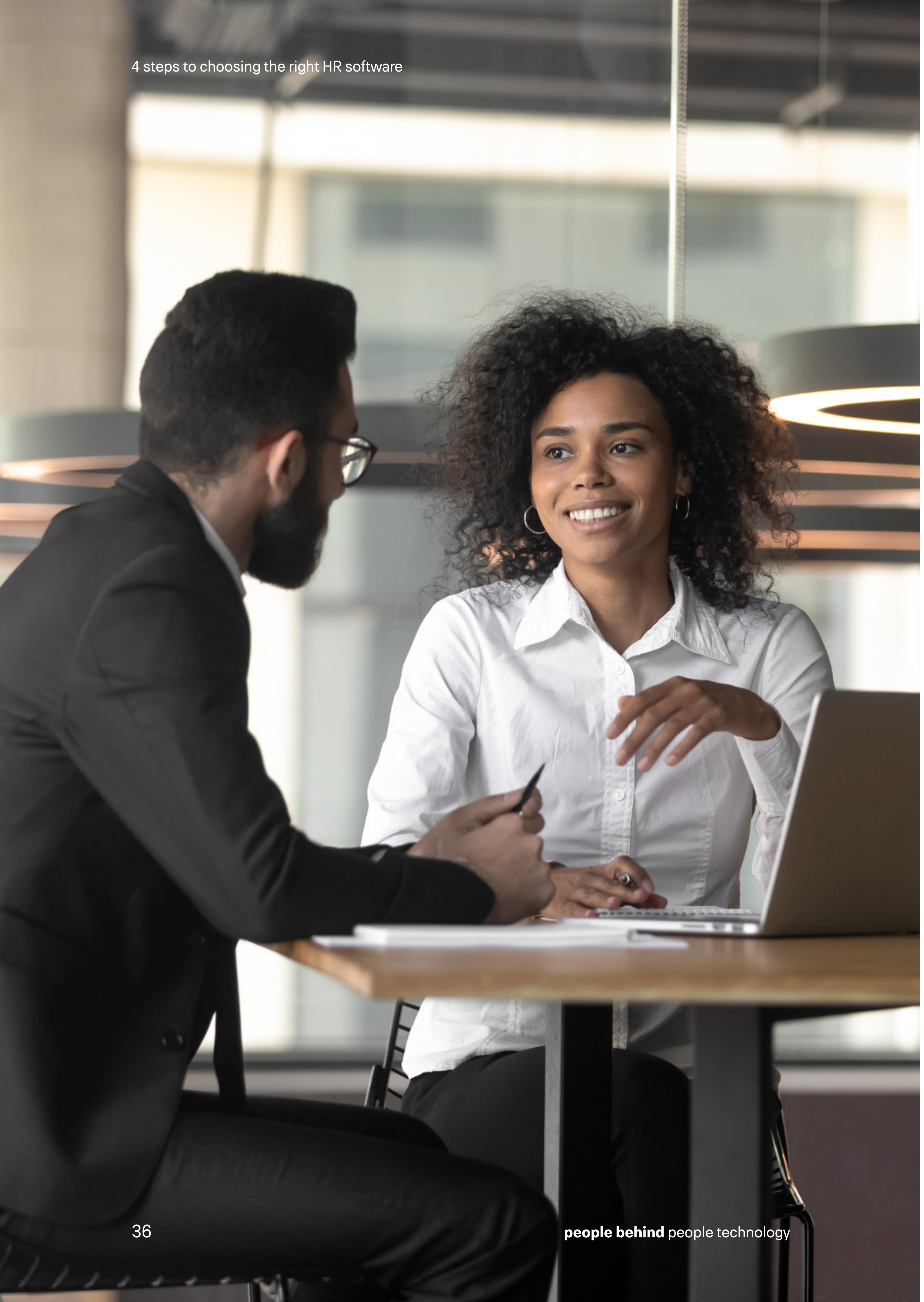
It's not over until you've signed on the dotted line

Although you've agreed to buy the product until you sign the contract you're still a potential customer. You're a lead that needs nurturing and you should use this leverage to your advantage to get the best deal possible for your business.

Use that leverage to negotiate things like renewal fees, support services and mid contract exit clauses. If bartering like this isn't your thing, find someone in the company who's happy to do it or work with a professional.

When you're in this stage of the negotiations it's wise to seek legal advice from people who are experts in software contract law and use their knowledge to make sure you're getting the best deal possible for your business.

You could also consult with Phase 3, onboarding new HR software for clients is what we do (and we're pretty good at it too). If you'd like our help or advice on any stage of the buying process you can contact us.



What next?

Congratulations, you've successfully decided which HR software is right for your business and have signed the contract that'll kick start the next phase of this digital transformation project.

Now that you've decided on a software you'll need to turn your attention to the installation and onboarding of the new tool. Your journey to a new, business-as-usual, HR software product isn't over yet. But you have taken the first step to improving your HR processes and improving efficiencies across your department and company.

If you'd like to continue the journey you can read our 12 step guide to HR technology success. This buyer's guide is a detailed view of stages 1 to 3, if you continue from steps 4 and 5, you'll be well on your way to successfully installing and onboarding some new HR software. Download the guide here.

STEP 1	STEP 2	STEP 3				
Business Case What are the reason for change?	**What product features will facilitate this change?**					

STEP 4

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