12 Steps to People Technology Success

A 12-step guide to Selecting and Implementing new HR & Payroll Systems

Tackling the Stages of HR Tech Implementation:
A Practical Guide for HR & Payroll Success

12 Steps to People Technology Success

Phase 3

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Step 1 Getting Started, Making the Case

Before selecting your system you must make your case for systems change. So often the basic business case is a frantic and furious scribble treated as a necessary inclusion in project kick-off: it becomes a piece of homework rather than something meaningful. Sometimes the considered capturing of the case is missed out altogether.

In either scenario, the *real* case for business change may never be actually made.

This book will tackle when and how to identify the benefits of systems change, the structure that your argument can take and the who, when and how to appeal to your project audience.

Context: proactive versus reactive change

Change in your HR & Payroll systems strategy inevitably arises reactively to change created elsewhere. Drive or you will be driven on the case for it!

Consider:

- **Organisational maturity drives change:** a first implementation, a scaling up of operations, re-modelling of HR service delivery, merger and acquisition
- **The activity of suppliers drives change:** tech providers de-support, release new products and services, contract cycles near an end
- **Appetite of employees or would-be employees drives change:** tech-talented workforces, candidate pools, culture change all demand different and better

Once the context for the project is established, what is the context for the business case for systems change?

We encourage you to regard the business case as more than a mandate of organisational project or procurement method. Most commonly HR need to bid for budget. You may be tasked to justify choice between options on spend or approach or to prepare for tender. Many methods expect a formal, written business case to be included in the PID ("project initiation document") and in this context the business case sets the baseline parameters for the project ahead.

Identifying the benefits of new HR technology

A key part of the argument is the cost/benefit analysis for HR tech. You will need a clear expression of the *why* of the project. Be

Key questions

What makes a project a project? It is the intention to create change as opposed to manage day-to-day operations. Set about a project with intent. If the HR argument for changing or developing technology is not clear, then how can you be clear that it is the right thing to do? These tips are equally applicable to other change projects in HR, not just with regard system.

TIP

Use the workings of a documented case to progress your own logical thinking. You could conduct this as a team exercise and a means of engaging HR team members from early days. The typical case structure is great for exploring ideas if a chair takes the right care to avoid suggestions of a "wish-list" that shall be delivered!

three things: relevant, realistic and real.

To be relevant, focus your arguments on the organisational or HR strategy. What needs to be happening? Do you need to grow, keep up with competitors, attract talent, reduce costs, achieve changing behaviours?

To be realistic, don't over-egg the savings and include the costs (sometimes called "dis-benefits") too. I've seen absurd estimations of time to be saved by automating employee process.

To be real, then give your points a decent sense-check. The nature of HR means that quantitative returns are only part of the story and you may have a very keen sense of the qualitative benefits that really justify the spend.

Which benefits should you include?

Even your qualitative benefits are most effectively captured as precisely as you can. Think about a benefit as an outcome achieving an impact. Without the latter, benefits don't convince.

For example, it may sound great to achieve closer systems integration, but unless HR/Payroll can point to the fact that integrated systems reduce time in dual-keying and risk of error then the case is not made. Where else to look?

- Automation of process leads to time savings. Quantify hours saved and cost of hours, remembering time saved for the many stacks up to more than for the few!
- The availability of management information improves compliance. Identify where pain points are currently in managing this.
- Improving accuracy in HR or payroll cuts not only overspend but effort. Assess how much could be saved here.
- Productivity gains could be made from the availability of clearer analytics on performance, as well as from increased engagement. Perhaps you can assess the potential in pockets of the business or amongst your competitors.
- Changing contractual structure or the systems map could achieve a direct cost saving on licensing or avoid the payment, perhaps in duplicate, of services not used or over-charged.

- A change in system, closer integration or development of new modules may result in closer compatibility: with IT strategy or other internal and external partner systems and new technologies you need to work with
- Fitting candidate and employee experience to your preferred employer brand may well reduce attrition, get ahead of the game, attract talent. Can you evidence this guess?

TIP

You are going to be including a number of different types of benefit. If there is a trump card then don't be afraid to state it! Avoid faking a logic to other figures simply to dress up circumstance. Compliance can be king. So can key stakeholder demand. In weighting benefits, take care not to place disproportionate value on savings for a (relatively small) HR or payroll team compared to those for a (relatively large) managerial or employee base.

- Address risk reduction as an end. Inadequacies in automation, information or compliance creates considerable risk. Specify those that apply to your context.
- Solve day-to-day problems and ease pain! Show that the impact will be an upward trend on employee satisfaction, motivations, involvement and innovation.

Key question

Should you include an overall figure for ROI ("Return on Investment")? Against presenting an ROI is the real difficulty in quantifying many benefits of HR tech change. We add that many find it hard to get the figures to stack up. In favour, bear in mind that financial metrics are the simplest way to evidence an opinion and consider that many recipients expect the ROI to be there. We prefer to attempt an ROI but to stress that such figure is just part of a story. Make clear the extent to which your ROI is comprehensive.

Presenting your business case

Let's look at the who, when and how of putting forward your case for change.

The convincing case is subjective to its audience. It makes sense, after all, for HR to balance the interests in the HR technology between those comprising your audience.

Whilst we caution against desperate and misleading attempts to get the numbers to "stack up", do take a finance focus by taking head-on how you have dealt with returns, considered costs and costed options. See different risks – financial risk, security risk, strategy risk. Check that your premise for recommendation is not unduly weighted towards one organisational interest and asset (that of its people) as opposed to other commercial or market dynamics.

When and how to present is naturally often suggested by context. Yet this overlooks an opportunity. You have an opportunity for greater appreciations, not least within the HR department itself, but also in tee-ing up competing bids for budget – and doing that right – with some advance planning.

Mid-contract activity on next selection or renewal negotiation is too often neglected in the HR systems world in favour of a race to the finish line. I'd start looking at a major system change 18 months ahead.

TIP

Why limit yourself to just one iteration of the business case? If your document is to serve its best use to you, then think about a first version that sets out headlines and allow your version history to capture a growing understanding of options, impact and appetite, translated into returns. Start an early version ahead, re-draft with a clearer idea of market options and revise to include a final version to baseline in the Project Initiation Documents

Allowing time for your choice period, less than 12 months is going to be tight unless you happen upon a choice of one of the more agile solutions.

The audience is relevant for format too and particularly when it comes to the degree of detail. A business case is typically written up as a document but if that's not prescribed then feel free to stick at a visual presentation and embed the right links to find the detail.

Our step guide here doesn't go into templating for you (Google will soon sort you out!) but it's worth understanding if a methodology is prescribed internally by a project management office or procurement teams.

Here is a sense-check structure, based on formal methods for PM-ship pinched, tucked and tailored to do the pragmatic thing and concentrate on what the case aims to achieve:

1. Go for the **overview**: key point, context, recommendation
2. Present the **options**: repeat the recommendation
3. Show off the **benefits**: and offset with the costs
4. Address **risk**: risk of recommendation and of other options
5. Add practical notes: particularly timing, budget and next steps
6. **Conclude**: stress your overview cut down to concluding size

Step 1 in short!

The business case for HR technology is one rarely to make itself and that's quite rightly so. Taking a timely, logical approach to gathering and presenting your championing of HR argument for new, developed or improved tools in tech will not only win you cross-functional and leadership support, but help to form your own thinking and effective decision-making once project-work steams ahead.

Keep it real. Making the case and writing that down adds true value only in so far as you believe in that you're writing. There's little sense in fictional figures, formality of formats or pretend perfection at draft one where uncalled for.

Take one step on Step 1!

If you do just one thing on Making your Case for an HR tech implementation, then clear up your facts. Fill in any gaps in your understanding of:

- Current contracts with HR tech providers: costs, dates and terms
- Internal requirements for budget bids, procurement and PM methodologies
- Time and effort spent in people-related process: in HR and in the business
- Attitudes! To your current tech, to competing tech choices, to HR service

Step 2 System Selection – the Right Choice

The plethora of choice in the HR technology market today makes system selection a point of fantastic potential, but difficult and daunting too. In **Step 1**of this book we looked at creating a relevant, realistic and real case for change. Business case beside you, the exciting part is the approach to market.

In this step we examine the options available and highlight some of the key considerations in selection. We explain for you about the right choice thinking; in the next step we will look at the practical steps of the right choice process.

Choice is a luxury as a client and it's a challenge. It means making the right decisions based on the right questions. Much of your up-front investment in the selection process is about framing those questions in the context of your own organisation.

A Marketplace: where do you fit in?

Each year we smile as reviews of the technology market note the degree of disruption and change. We need to expect that change to be at a pace your own experience cannot keep up with. In the selection process, that means approaching the market with open questions rather than too clear an idea about what you envisage.

Size used to matter enormously. Experts typified the HR technology market as distinctly tiered. Large companies could afford access to 'enterprise' solutions from the global giants of people technology. SMB's picked off the shelf low-cost options with limited configurability, more recently cloud-based and with the self-service and mobile offer. In the UK, the mid-market 'tier' targeted a limited range of products at employers of, perhaps 500 to 10,000 employees.

This is no longer where we are at.

It is still useful to start with this 3-tier framework in mind. Simply bear in mind that boundaries are less clear these days. Large HR system providers now offer scaled-down options, accessible to the 'mid' organisation and smaller systems are frankly so good that they are worth a look if you are 'mid' too. It costs less to offer a better product (cloud helps here!)

Here is how to understand where you sit in an increasingly complicated market-place for HR systems:

Step 1 – Yes, continue to use your size as your start point. Broadly bracket yourself.

Step 2 – Know what kind of product you want to buy. What would be your Google search term?! I offer some tips on jargon below.

The right scope typically balances benefits of integration and of specialism. Unless you can afford an enterprise solution then look at 'best-of-breed' core HR systems. These can integrate payroll. And you can add bolt-on solutions for

TIP

We counsel against a post on forums such as LinkedIn asking 'out there' for recommendations about which system you should buy. Yes, you'll receive a random collection of genuine experiences, but also a good deal of unwanted sales contact and, more dangerously, non-contextual views that are ill-explained to you. Your own system selection is contextual to your organisation. That is why we're loathe to make suggestions that refer to specific product choices. Your yellow brick road is someone else's garden path.

specific functions, for example recruitment, learning or time-recording. You might want to treat your business intelligence requirement separately (and this can prove a wise move).

Step 3 – Next get to grips with deployment

Distinguish models for (a) technical hosting and (b) licensing and purchase. The first is about IT and the second about procurement. Confusingly, the term 'SaaS' is commonly used to cover both and it is always worth clarifying. Buying Software-as-a-Service (SaaS) means, in procurement terms, that you buy a licence over a contract term as opposed to making an outright purchase. This is typically the difference between capital and operational expenditure.

You can host your system 'on premise' within your own IT infrastructure or more commonly these days you'll want it in the cloud. Cloud-computing is the new norm for software hosting services, meaning provision via the internet rather than directly to a server. Public and private clouds, as well as server virtualisation, make this no longer a binary choice. Involve your IT team to understand what you want to look for. Few vendors can't now offer the cloud option.

Yes, SaaS licensing tends to suggest towards cloud; outright purchase towards on premise solutions, but it does not have to be so. This means that if your IT and Finance leadership tend to pull in different directions on the 'out there' versus 'in here' choices then there is a likely an answer to suit all.

Key question

What do the HR technology providers currently think of you? Have you assessed your strategic strength in the selection process? This is a marketplace. Whilst we wish this were not true, you are an influencer as you go out to make your choice in a balance of supply and demand. It's worth a thought (and perhaps a bit of current know-how advice) about whether your size and sector is currently hot property. C'est la vie!

Remember too that which box your system sits on does not necessarily affect asking outsourced providers for services to help you use it! Managed service plans are a third dimension to the way in which you buy your people technology.

Getting to grips with deployment is a great example of what the HR systems industry does with words:

Jargon-busting, smoke and mirrors

Technology is for the HR professional a minefield of magical, mystery terms. The earlier the better de-mystify anything that you are unclear about.

Remember that HR leaders do not need the detailed grasp of technology concepts that is the job of those in IT. For example, the struggle with public and private cloud, getting rather lost in hybrid options. Deal with this by aiming for questions that ask about impact: what does that mean for me? How does that affect me? As with the best of interviewing technique, you'll want to funnel. Sensible follow-ons ask about cost, service, operability, flexibility, scalability, security, upgrades.

Above we mentioned the ambiguity around SaaS. Here is more example material for muddle:

Example: Interface and Integrations

Likely your overall systems map will involve the core HR system talking to payroll or other technologies using interfaces. To interface can imply a full API (application programming interface), achieving a direct technical link between systems. Others may say 'interface' asking for Excel spreadsheet upload for now. Ask about the options in between.

Example: Features and Functions

In this case it's a grammatical difference and I think a red herring. Features are things a product has; functions are things a product does. For example, whether we talk about a configurable workflow tool as a feature (the tech has it) or the functional ability to send users pre-configured alerts (the tech does it) matters not.

Don't be blinded by science – whether the science of the IT or sales professions or the purists of the English language.

Considerations of Choice

So far we've appreciated the overall landscape of HR systems and how to make sure you have your ears and eyes open. Now you will need to begin a considered method of gathering and weighting factors upon which to build your short-list.

Which factors should you take into account?

One nice and simple suggestion is to think about questions about **you** and **where you're at**, questions about **the product**, questions about **the supplier**.

- About **you** factors include: your size, sector and geography, as well as your organisational culture. Consider with culture too, the organisation's attitude to technologies and the appetite for risk
- About **where you're at** factors include: the status quo with HR systems currently, key milestone dates, organisational priorities, in-house skills and capabilities. What does the future hold for you?
- About **product** factors look at both breadth and depth of the scope of benefit you want to achieve: modules, HR functions and modules on offer, integration potential, configurability, self-service and mobile option, the user experience. Return to your business case benefits here.
- About **supplier** questions include: service and support, the propositions for deployment, licensing and managed service terms, security policy, as well as the company's reputation and history

Cost is not on our list of considerations here. That's because, if you've made your business case, you will have identified what you can make good use of.

Proportionate thinking about potential returns and about the overall HR systems market tend to lead you to a cost bracket. With the internal context where no doubt you have your 'pot', you have thereby a natural negotiation exercise ahead of you. What you do *not* have, is any further reason to change at early stages views about which system is the right one for you.

TIP

There are assumptions that accompany the technical terms. Take cloud and security. Is the cloud inherently more or less secure? I have come across both HR and IT professionals who regard cloud-based technology as attracting greater cyber security risk. Others take the opposite view. Be wary of assumptions.

Key question

How should you weight factors? Tender documents often include a scoring system and within such scoring there is inevitably scope for your views.

Controversially, We'd encourage you to put the product considerations at the outset lower down the ranking. Ever-increasing capabilities we noted above likely outstrip your expectation. Bear in mind which factors are immutable. Separate factors under your control, and separate which supplier-led factors relate to product and which to services.

In part 1 we suggested that an overall ROI figure is helpful only so far in your business case for HR technology; we suggest the same for too precise a score on selection factors.

TIP

If you have not yet documented a business case, then do so now. It is never too late. Read here for how. In the system selection stages this will help you describe to the suppliers what you need; later on that case will help you assess whether benefits are being realised.

Step 2 in short!

You're addressing a massive step. Invest in it.

A key point is that the 'right' choice for you (and there may be no right choice!) is almost entirely contextual. That is why I am encouraging you to explore your thinking in system selection rather than giving you a this-year's ranking of the best systems.

On smaller scales, question whether this could be a 'good enough' choice. You might want to choose just because. Because you like it, because you've explored it, because it's 'good enough'. In a complex project scenario, bear in the mind that unlikely is there one dream solution.

Context and a consideration of factors leads to a short-list. Amongst the short-list, focus on impact between differences. In making a choice, focus on the dealing with the differences.

Take 1 step on Step 1!

Having checked your facts (see Step 1), then decide on your source(s) of overview and objectivity. Finding objectivity is surprisingly hard. Some practical suggestions are:

- Read at a generic level. Try the independent HR press and some product vendors do offer helpful blog features
- Find a system selection expert consultant – invest, if your budget and scale warrant
- Attend an HR technology showcase event. I recommend the CIPD software show, where the take-away exhibition guide gives you a starting long-list of products
- Try out an online software product selector tool – these serve as a basic filter. Note most are designed for the US market
- Talk. Find relevant reviewers amongst your peer and sector group. Will they show you their own system?

Step3 System Selection – the Right Process

So far we've considered how to put together the business case for HR systems implementation and in **Step 2** we helped you to understand how complex the choice of solution now is and how hard it is to position yourself in the market.

This month's guide aims to make sure the process of selecting HR technology does not derail you from making the right choice. We've seen many implementations de-railed on process or, more accurately, on too much worry about process. Unfortunately for most of us, system selection comes up once in blue moon and so we don't get an opportunity to practice the process.

Here is a practical guide to the steps you'll need to take to creating a process and getting the most out of it.

What steps are involved in the process of system selection?

Most clients we work with find it helpful to have a clear map of the typical process between identification of the business case and arriving at a project start ("project initiation"). If you are an experienced project manager, you might find it handy to share an outline with your less-experienced colleagues.

The role you expect to perform in managing the project will afford you more or less choice about precisely how these steps are organised in terms of style, method and depth. The well-known project methodology Prince 2 offers the principle of tailoring to suit your environment. Formality needs to fit. Beware bureaucracy but do justice to the detail where deserved.

It is unlikely that elsewhere you have written out the activities of selection, except against a calendar or project planning tool:

- **Pre-Selection and Requirements Analysis** – the business case is taken forward into stakeholder discussions and requirements analysis, which is the fullest part of the pre-selection activity. Examine in detail each area of the system scope, aiming to capture in a clear specification. We recommend (see below) including a 'lessons learned' workshop.
- **The Tender Process** – tendering is the approach to the market of suppliers. Invitations, replies and countering detail can be formal and I'll explain in this article how to decide which and what to use.
- Larger organisations typically involve a procurement department and with associated guidelines and frameworks to work within to support you through this part of the process.
- **Product Demonstrations** – you will wish to see a showcase demonstration of a handful of different products selected upon examination of responses to your tendering process. Most organisations choose to see between three and five systems. Second rounds are advisable. *(Read on for some tips on how to enjoy the excitement of new stuff without falling into the booby traps!)*

TIP

Systems are more commonly over-specified rather than under-specified. Whilst tempting, this can lead to unnecessarily ruling out great solutions or embarking on project plans that flounder in over-ambition. Over-specification encourages salespeople to concentrate on the whizziest features (or future features!). You should think about your aspirations in terms of essentials and desirables, rather like a person specification, to help you structure your thinking.

- **Decision-making and Due Diligence** – there is a short step in between the decision you'd like to reach and informing the sales personnel, but it's a key one. Due diligence checks include following up references, often with site visits, asking more questions of the supplier company, exploring company background, financials and client-base. There may be more work to be done to confirm options for technical hosting or licensing *(for a broad understanding, look back to **Step 2**).*
- **Contract Negotiations** – work with a legal adviser or someone expert in handling the substance of technology contracts to agree on precise terms. Familiarity of your own context should allow you to judge how extensive this process is likely to be as a time-factor but do – right now – take a moment to consider quite how influential a step this is! *(I will look at some of the grey areas in the next article.)*
- **Project Initiation** – off the back of happy agreements, project teams are put in place and there is a start to the project. Expect this to begin with a "kick-off" meeting.

TIP

Whilst it's ideal to get expert and objective help with the full system selection process, if your budget is limited then spend wisely. Pre-selection requirements analysis and contract negotiation are the stretches of this selection road-map where the greatest specialist knowledge add most leverage in the least consultancy time. Consider using the same person to help you out later on with scoping too at project start – this needs to join up.

Handling the Tender Process

For HR, tendering can tough due to technical complexity and unfamiliar processes.

What is the role of procurement? If available, then procurement professionals will help you prepare documentation for tenders, keep to purchasing strategies, budgets and legal requirements and (later) to draw up contracts. A procurement framework agreement may make it easier to ensure compliance by suppliers.

Procurement structures can *feel* restrictive, but they are designed to help. Ask for a brief from that department so that you can work out together from the outset how to benefit from the safety, the groundwork and the expertise without restricting choice.

If you need to manage tendering directly, then the choices are yours about how to tender. Be pleased with this choice! There is no need to be bamboozled by the business-speak of tender terminology...

Key question

How long will the selection process take? How much time should I invest?

Put this on the agenda for your exercise in 'lessons learned', because timescales are much determined by your own organisational habit, structure and the associated complexity of project. In our experience, selection itself takes between two and four months. Subsequent implementation, by comparison, may well span 12-18 months but if all parties share a greater agility, then you could be live with an integrated HR and payroll system within as little as 2-3 months from the point of contract.

Don't hold me to it – much about timescales is within your gift to control!

Consultants tend to plan on spending between 10 and 20 days to steer a client organisation through selection work. But note my tip above if funds are hard to find.

Key question

How do you know which type of tender process format and documentation to use?

Phrases used can be confusing. Here is some deciphering:

Request for Information (RFI) – is an initial ask for information to find out more about your requirements before you make a more formal request.

Expression of Interest (EOI) – gives potential suppliers notice that you'd like to hear from them. You could also achieve the same as part of an RFI.

Invitation to Tender (ITT) – in HR technology is perhaps the acronym most commonly used. An ITT is a documentation of requirements that is detailed and specific. For your central market enquiry, you could otherwise use:

Request for Proposal/Tender/Quotation (RFP/RFT/RFQ) – the formal stage of market enquiry. Nearly interchangeable, choose "quotation" for simple price enquiries, "tender" for specified but complex projects and "proposal" where there are different kinds of solutions to address a business need, rather than a clear solution.

You do not need to work with any of these terms if you do not wish to do so!

The key point is to convey your requirements to potential suppliers as accurately as possible and to help those organisations to present accurately by reply. Do not confuse accuracy with length and detail. A traditional tendering process can include extensive documentation – but question the value of lengthy tick-lists. Instead you could aim to draw out the points of differentiation between your specification and others'.

For example, whether a payroll system is complaint with current HMRC rules can be checked on the HMRC website. Instead explain the need for accommodation of a particularly complex pay element or a business process for authorising pay change that is atypical.

Familiarise yourself with these phrases, particularly as others will use them. But have confidence that terminology doesn't greatly matter. The essence of tender is an ask and a reply, a to-and-fro of information sharing.

Why not send a '**Supplier Invitation**' and ask for a '**Reply to Invitation**' and then '**Project Proposal and Quotation**'? These are my words and they aim to avoid the ambiguities of the above. It is helpful to potential suppliers to provide a written guidance note about the process you expect of them, giving contact details, next steps, dates and deadlines. If you want to work with a certain format, then say so.

Product Demonstrations: to be seen, to be believed?

You will be asking those shortlisted to visit you (or sometimes attend remotely) to provide a full demonstration of their product. After tedious documentation, introductions and admin this tends to be something of a high-five high-point in system selection processes. It's a lot of fun to see the aspirations you have for your HR vision come to life and screen in front of you!

But you should be wary of product demonstrations. Not without reason is the concept referred to as a 'beauty parade'. Bear in mind:

- Sales personnel are more likely to show you what is great about the product and less likely to fill in the gaps
- Those representatives are not the same technicians who will be responsible for your project initiation or post-sales support
- You are seeing a test system which is especially built and carefully set up to look good. I have even heard of a case where demonstrators have used a slide show of what a product should look like, rather than logging in to any system at all. Ask how much was pre-configured to show you what you are seeing
- Be extra wary when future developments on the product roadmap are relied upon

Key question

Is HR system selection an art or a science?

Experience teaches me that project teams in practice reach verdicts based on something beyond a purely analytical assessment against the requirements. It is proven that decision-making is a complex interplay between the rational and the emotional. This means paying attention not only to the 'art' of managing the process (plenty tips through this series!) but to the emotional resonance of the project issues themselves that are in scope.

Encourage those insistent or resistant to understand earlier rather than later that things will make a difference to them. It is easy with HR technology to care too late in the day.

- In the representations made to you, understand why things are sold as recommendations or benefits, and whether therefore stuff matters to you.

How can you get the best out of product demonstrations?

1 **Prepare.** Send in advance some specific, differentiating functions or processes that you wish to see modelled as you'll require them.

2 **Help** the sales people to help you! There is no point in making this too tough a test. Offer information in your supplier invitations about the context for your project. In the session, steer them back on course if they are not showing you what you'd ideally like to see.

3 **Invite** a manageable number of people to attend. Too many and you won't achieve the full agenda; too few and you are unlikely to have representation broad enough to cover the different concerns (don't miss out the senior stakeholder, an IT representative and an end-user)

4 **Manage** your own excitement and that of your team. Stick to an agenda, take notes and have in mind a second round

Step 3 in short!

We concluded last time that making the 'right' choice is something that is contextual and therefore can't be done for you; by contrast managing the selection process is a question that can clutter the key thinking you need to do about those choices. Process should be a facilitator of the right choices. Here it is no more than a structure of asking, hearing and deciding.

In setting out your requirements you do not need all the answers, but you do need to know which questions to put. Selection is about mutual information-sharing.

Make sure you are confident on both the art and the science of a simple set of steps that will take you from business case to project initiation. A key point is that you and your organisation are in charge.

Take one step on Step 3!

Arrange a "lessons learned" workshop. It is rarely done, but easy to do and both rewarding and valuable. Getting internal stakeholders together to review previous HR system projects (and ideally include projects carried out in other parts of the organisation too) is a great way to engage team members from early days, as well as deriving useful insights and evidence from history. You may well be able to start making very practical plans for the weeks ahead – for example in looking at your project management method or the resourcing allocation you can give.

How? Decide who you want to involve and get everyone in a room together, having shared the aim of the session in advance. Make sure the group has a chair person to keep discussion on track. Keep notes on points of consensus and those contested so that there are clear outcomes. You can go grander, but it's as simple as that to be effective. Talk. Find relevant reviewers amongst your peer and sector group. Will they show you their own system?

Step 4 Help with Your Homework – Documents and Discovery

We pick up the implementation journey after a step-by-step focus on the right process of system selection and at the point where a choice of HR technology has been made. The project is, as yet, not initiated and no-one has signed on the dotted, detailed lines of the contract.

The happy honeymoon of these few weeks you will find little comment on and, unfortunately, this is often reflective of a lack of thought and action. Here I will help you with your homework to be forewarned, forearmed and at-the-ready for a successful "kick-off" and a smooth first phase of the implementation process.

We appreciate that you are waiting at this stage for guidance, information gap-filling and for some introductions too: first up, you may well be waiting for legal departments or supplier representatives to get back to you. This does not mean that you cannot be making progress in some of the heavy-lifting effort. And we recommend that you do.

Get ahead and you'll save time, start relations well, avoid risky peak periods and make accurate outcomes so very much more likely.

Read on for the help with your homework.
But first there remains a contract to sign.

Negotiating: what to do before you sign on the dotted line

The bad news is that the hard work between selection system and project start ("initiation") is for you to do. We stress that this includes the agreement on terms and conditions. Engage with someone who is an expert in the niceties of HR systems and technology contracts. *Later in this series I will look at some of the types of professional available.*

Above all remember that, until you've signed on the dotted line, you are still a *potential* client, a prospect, needing to be won over.

You may believe that there are fairly standard terms of an HR system contract; certainly you are likely to feel as though the terms put in front of you are standard supplier terms and, therefore, that you should accept.

Please be aware that this is far from the case, not least because of the speed at which the HRIS market is changing, meaning that very practical questions such as cost, service styles and IT hosting models are in constant flux. Combine that pace of industry change with the dynamics of market demand and you'll see why contract terms are rarely to be exactly compared.

For sizeable technology implementations, you are likely signing up to two contracts, or parts of – one for product licensing, most often now SaaS and one for professional services. Some things about how technology is safely supported are not really up for grabs, but the expertise that you choose to buy in association very much is.

TIP

Judge how wise it is to negotiate hard. Consider the other signatory party. What is going to be the impact if you short-change them? Will you feel the offset? This may sound naïve but if the contract conditions are fundamentally fair ones, then more likely all parties can deliver. Negotiating a great "deal" does not necessarily mean driving the hardest bargain, in a context where for an extended period of time there are set to be so many moving parts.

Key question

Is a fixed price or time and materials ("T&M") contract better?

There is no one-size-fits-all answer here.

Typically any fixed price arrangement work best (all round!) where scope is very closely prescribed and time-frames are short. Fixed price does have the advantage of budget certainty. Milestone payments are a twist on fixed price.

But we are not fans of fixed price models. The service provider needs to buffer your own budget safety with a margin to mitigate their own risk. Whilst you appear to shift the risk on cost, you take the risk on quality. And ever so rarely, as a client, will you not need to change your requirements just a touch!

In all cases plan for some contingency budget. 20% is not unreasonable if you are stuck. Some suppliers like to talk to you about contingency funds in an open way, which we welcome.

Which are the grey areas of contracting for an HR technology project?

Here are some of the terms that HR and project managers tend to zoom in on:

- The service level agreement ("SLA") for fixing faults
- The per-day consultancy cost (treatment of expenses gets unusual attention)
- Terms about early exit and what happens were a supplier to go bust
- Any conditions that appear open-ended, such as the right to respond to legislative update or to charge for client default, or:
- The restrictive flipside clauses that appear to lock you down
- Rates of price increase year-on-year
- Apparent total cost values

We can understand why these are the clauses that get the attention. They are points where the impact is readily implied. They are also emotive. We encourage you to analyse your own thinking on the contract terms.

Instead try considering:

What has "teeth". For example, an impressive SLA – simply because breached – does not deliver you the most important remedy, which is the fix!

What's the cost. The impact of your negotiation may bite you someplace else. *Read the tip below on consultancy costs.*

What will happen in practice. For example, what happens if the supplier fails? If you have serious concern about financial stability (did you do your due diligence?) then to be looking for an Escrow agreement could be wise. Bear in mind though that a more practical focus is the ease with which you can just grab your data, which might be much more simple.

What you know about. Distinguish terms you feel to be unimportant because you don't understand them and those you feel to be unimportant because they are. Be confident on things you understand and delegate to a legal eagle the rest.

What is missing. Total costs are atypically total! Look laterally at that figure and think what else you might need. Help with data cleanse or migration, for example, is rarely on the list. Is there enough training and support time?

What is mandatory. Very little by way of consultancy time do you *have* to take up. Inflexible breakdowns of expertise type can be limiting. By contrast, to deliver SaaS technologies, some aspects of that license agreements do have to be common to all.

On contract, have the courage of your convictions. Until your supplier has graciously received your signature, then the control is with you as the client.

If you are struggling on confidence, reflect on how the dependencies ahead are going to shift.

Dreary data? One of your most important focuses

One reason why you'll find few articles on this rather rudderless drift from system selection to kick-off is perhaps that it is regrettably a bit dull. Much of the homework We're going to suggest here is frankly the heavy-lifting.

But consider this: *it has to happen!*

If you do not do your part in the implementation work now, then you will have to do it later. To get ahead with your data, your documents and your own "discovery" buys you time (which your project team has more of now than they will later!) and reduce risk on time in tight periods later on. Most importantly, understand that an initial data import is a one-off moment to get accuracy right. Invest in it.

TIP

We are wary of encouraging clients we work with to drive down a going consultancy per-day rate too far, if at all. Whilst the cost of hosting software is going down, the market rate for *good quality and experience* of consultants is not. If you "achieve" a lower price point, can you be confident that you will still get the best team? How much do you know about how you will be resourced? There is no point paying less for something that is either no good, nor not available when you need it.

For most in HR, an effective approach to preparing to get started with implementation requires a different way of thinking about information. Your aim is to give those technicians who will be helping you configure the software an absolutely, unarguably precise set of instructions.

You and your team need to set out accurate, complete and structured content for your new technology.

Here is a simple, suggested checklist – at a headline level, *have ready...*

- ☑ **Employee data:** not just personal, but job data - and data about the type of system user they are
- ☑ **Organisation structure:** show this in a form that is more precise than the typical pretty organogram trees. Note the need for reference numbers and talk to Finance about the link to costing. Show who reports to who.
- ☑ **Process maps:** comprehensive diagrams (a tabular format can also work well) about how currently your HR processes flow
- ☑ **Terms and conditions:** ideally set out in a format more structured than a policy document, making sure to note any exceptions. Whether employment T&Cs attach to people, posts or grades is something to pinpoint.
- ☑ **IT information:** notes from IT about the infrastructure and current specifications associated with any HR, payroll or finance

Key question

What does it mean to cleanse your data?

Data is rarely in good shape. Cleansing your data - which means preparing it to a state of readiness for the new system – means assessing what state it's in now. This includes looking at:

- Data that is incomplete
- Formatting of data
- How up-to-date data is

With this understanding, and some decisions about which data you actually need, the method of cleanse has no grand secret to it. There is no getting around finding someone to work through files (typically CSV), checking it and changing it. Bear in mind that a part of this is asking all employees or their managers to check records. This is not difficult, but it can prove difficult to do systematically. And it certainly takes a lot of time.

technology in place (line up a contact name and you can also obtain from your supplier the new IT specification)

- **Referencing system:** you need to work out how each type of data going in is going to be referenced. Every person record needs a unique reference number, as does each part of the organisation structure, each pay and/or costing element, etc.
- **Report requirements:** whilst fine-tuning your Management Information ("MI") suite is best done during project when you are aware of the fullest potential, it is typically thought about too late. I recommend an early indication of requirement at least.
- **Current HR system contract:** not of concern to your newly chosen system provider, but don't archive it just yet. Have to hand terms on exit, including penalties, notice periods and what happens by default at the end of an initial period.
- **Project planning and method information:** *in the next article I'll guide you on some sensible options here.*

No promises that this list proves to be exhaustive, but I would place bets that it keeps you busy enough.

And therein lies a comforting truth, posed with a question:

Key question

In your preparations, we are pre-initiation and pre-discovery. Discovery is all about information-sharing. But in your self-discovery, as you work through information-*gathering* above, it is worth considering how sure of what you want you (a) need to be and then (b) are wise to be....

For example, an important question you will shortly be asked is how much historical data you wish to bring across to a new system. This is a difficult one, as it feels safest to do lots but the effort and cost impact is enormous. A consultant can help you crystallise your thoughts, with the advantage of much experience and a know-how on quantifying that effort and cost.

Where you are not certain and there are options, take your prep only so far. Bring instead a question. *You do not need to know all the answers, but be ready to ask the right questions.*

Business process review: how to do it properly

Business process is translated within the HR tech into workflows and authorisation processes.

Do not assume that your current process is the one that must be re-built. Do map those current processes. Don't miss a trick to use the opportunity to review those with a new system.

Choose to do this amongst yourselves or to engage an external expert depending on your skillsets, the degree of difference you expect in the technology capability, as well as any internal team changes you wish to achieve and of course the cost.

TIP

A great start-point for a facilitated and objective business process review is if you can describe – against a diagram of how things work currently:

"The purpose of this process/step is to.....

The most difficult things for us prove to be that.....

And what matters the most is that X, Y and Z happen along the way/as an end result."

This gives an expert the right clues about how to solve pain-points without delivering you solutions that may make the best of the technology but miss a crucial outcome. And for you the open-minded nature of the process presentation allows you the best chance of hearing about the possibilities you may not be aware of.

Step 4 in short!

If we cast a grey cloud over the happy honeymoon that we've observed between "phew, we've got it" and the day a project begins then we do so with no apology.

Formal project theory will tell you that, by their nature, projects have a start and end point. But we think your experience of the implementation journey may not feel quite like that. Your internal change mission began long ago and you are well advised to take active charge of the weeks between system selection and the kick-off meeting.

- Negotiating precision of contract is a point where you have a firm balance of power; and a balance about to be destabilised, so use it now!
- Data is the heavy-lifting; get set to take maximum advantage of a moment coming soon where you can import automatically but accurately.

Just because the interval here lacks the glamour of the "beauty parades" and system selection, nor the apparent wins of steps to come, does not excuse a top-performing organisation keeping on-the-go. The homework is hard-going, but **practical doing work of data, documents and internal discovery are not difficult**. You will reap your reward.

Take one step on Step 4!

Make a file. Everyone can do this. Ideally make it an electronic one and ideally use the structured formats suggested, completing file templates provided. But if you do just one thing, then it is please to arrive at project kick-off with as much detailed information as you can gathered into one place.

Step 5 Planning the Project – HR as the Professional Project Manager

One of the key success factors in HR tech implementation is a project mindset. A project:

- Achieves a defined change
- Has a start and a finish point, where you can see that change has been delivered

Yet project-thinking does not necessarily come readily to the average HR professional and project management (PM) techniques are not in our training.

We have already in this series got you going in progressing some of the project steps – business case, system selection, contract negotiation

In this step we will help you to understand some of the fundamentals of project work, terminology you'll come across and practical tips in the context of HR system implementation.

Project Management Method: made meaningful

Most organisations recognise the benefits of professional project management involvement in any significant HR technology implementation. Sometimes an internal PM is appointed, typically from pre-selection stages; sometimes I see internal teams waiting for the arrival of an external PM at "kick-off" *(more on this below)*. These professionals bring expertise in one or more methodologies.

Here is a crash-course in concepts to help you make sense of jargon!

PM methods are more or less formal and structured. Typically those techniques now regarded as traditional are still used in HR systems work. Likely you've heard of Prince 2, a UK-developed framework, or perhaps PMBOK, the most significant global PM organisation accrediting method and training. By contrast nowadays there is an increased shift towards "agile" methods.

What are the pros and cons and should you care?!

Quite likely your organisation has a preferred method and you have no choice. Or your product supplier brings their method along. Or you may not hear any specific method mentioned at all.

- **Formal methods** (e.g. Prince 2): provide a series of structured stages, planned to follow each other, in order to achieve tight controls. The benefit is a rigour and the safety of structure. Such methods are also widely shared and understood. The disadvantages can include more formal documentation and less flexibility.
- **Agile method**: developed in the context of software design, this allows you to work in shorter stages and respond to results with less pre-planning. There is greater focus on collaboration and teamwork. Within the context of HR technology projects, the risk could be less visibility and definition ahead. Agile methods are thought to be speedier!

TIP

By the way, we encourage HR leaders to adopt a project approach elsewhere. Learn to differentiate responsibility to steer something ongoing (GDPR, for example, is a new one for us) as opposed to change initiative, such as a re-structure or cultural re-positioning. As you read this, think about how you can use helpful concepts that PMs apply in formal projects to your own day-to-day ways of leading to achieve a surer control over progress.

Unless you have significant amounts of time to invest in studying PM methods, I encourage HR leaders and managers to concentrate on the selection choices you likely face for resourcing, both internal and external, rather than the particular method those appointees plan to use.

In a later step we'll address specifically the options for resourcing your project. For now, you may wish to read *this guide* to a good job description for a project manager.

Simple ways to plan and control

What if you find yourself acting as Project Manager on top of your day-job in HR?

Yes, this is hard and it's not ideal. But in smaller contexts or where budgets are tight, or perhaps where you've not yet succeeded in the buy-in from Board to invest in that way, you may find yourself alone.

Sometimes there is the misguided belief from senior stakeholders that, because you're paying for expensive supplier PM-ship, there cannot possibly be justification in appointing internally too.

Kate Says: "This is my story of becoming an HR technology specialist. To manage a transition point in our HRM team, I was asked to take on project management for our system implementation. That sounded fine and so I said yes. One of the reasons I write with a passion to translate between HR and technology is because I remember all too well quite how sharp and steep that learning curve was. And with hindsight quite how much I could have done had I not been deeply, despairingly lost."

So we offer a few straight-forward suggestions to create an easy means of planning and controlling project progress:

- **Create a structure:** be clear – and share – internal team project roles, including accountabilities for tasks and how far to take those tasks before reporting back. Structure regular meetings and reports for those people.
- **Diarise:** even if you are on your own, to overcome the challenge of juggling other priorities, it is essential to have the discipline of desk-time to review progress as a regular diary slot. The start of a week can work well.
- **Write highlight reports:** borrowed from Prince 2, this is a regular note of what has been done, issues arising, what next to do and a track against key metrics, such as time and budget. Documentation does not need to be wordy.
- **Keep a log:** the second type of report that I find invaluable despite the most modest of scale is a brief diary-style log of events. Managing suppliers effectively is much easier if you have your own brief record without trawling through emails. And managing your own to-dos too. Link in meeting notes.

Key question

Who should the PM be?

Your supplier will provide a project manager as one of the implementation team assigned to you. However it is a mistake to rely on this person as the only PM role within the project. You do need an internal PM too, even if that role is part-time. Expect the supplier's PM to offer a project plan, resourcing schedule and reports that cover the work that *they* are doing. But this misses the lion's share of the implementation effort, as well as the internal perspective.

Usually it is also a mistake to assume that someone in HR can be the internal PM, if you have alternatives. Not only does this require the kind of project-thinking we're not trained in, but it is very hard to juggle with an operational job.

- **Recognise risk:** often an unfamiliar exercise for HR - maintaining a risk register. This just means up-front identification of project risks and giving each a rating for likelihood and impact. Note how you plan to reduce risks and deal with them if arising. Make part of your regular project desk-time a continuing watch of that list.
- **Buy in to the business case:** in **Step 1** we looked at how vital the business case is. Keep that visible for yourself. The benefits you identified, against their respective due dates and allocated budgets, are your key baseline tracker tool.
- **Consider a critical friend:** if you cannot afford a full-time expert project manager, consider engaging a specialist for occasional but regular dates with you as a project mentor, guide and critical friend. This safeguards your dedication to discipline, tops up your know-how and can boost your stakeholder leverage with the weight of objective advice.

TIP

When we considered system selection my suggestion was that you carry out a lessons learned workshop from previous implementations and/or other projects carried out internally, whether or not in HR. Post-selection, when devising your own approach to managing the project ahead, it's a good time to look back at those notes. If you didn't do that exercise, then do it now!

And if you are not the internal PM?

Working with the combination of both a supplier and internal PM can prove just as challenging as handling all alone!

In this situation, your stakeholder role is as a type of user. This is the interest you represent. The best ways in which to engage with one or more project management colleagues require you to support the requisite processes for communication and to work to the clear parameters of your own role and team tasks. Understand the PM role to manage and control as distinguished from who is the decision-maker or sponsor – and that could be you.

Importantly, as the lead HR system user voice, make that interest loudly heard.

Success lies in successful stages

The project manager draws up a project plan, which they should then maintain for you.

Project-work that extends over more than a few weeks is probably planned in stages. Whether you use formal, structured or agile methods, to think in terms of milestones and stages is really helpful.

It is most common that at the project initiation (or "kick-off" – *and read on*) the supplier will gather the facts required to write a baseline plan. The first stage is most likely to be planned in the greatest detail. And this baseline plan they will give to you….

TIP

The 7th of seven principles of Prince 2 is that of "tailoring". This means adapting method to suit the style, scale and scope of your organisation's context. Apply tailoring by creating your own techniques, with confidence, that focus on the purpose of project management:

- **Managing is about controlling; projects are about achieving change**
- **Project management controls how that change is achieved, to be sure of the right results**

Keep this in mind and your tailored method cannot go too very far wrong!

Example: above we suggest you keep a risk register. You could download a template from one of the recognised PM websites and simplify it, asking whether all of the information adds a value, reducing the recipient list suggested or changing terminology to suit you.

Here we'd like to share three clues about working with plans in the context of HR technology:

You do not need to accept an off-the-shelf plan. Nor do you need to accept the first draft of a plan that is devised for you, even if with the greatest of diligence by your new external PM. You will be aware of an internal context that they are not, such as important dates, priorities, people's availability and how change is managed most successfully within the organisation.

TIP

It is extraordinary how often holidays get forgotten. This simple omission could mean the difference of a month or two of progress if you and your supplier do not factor in holiday seasons. Whilst you don't know ahead of time precise dates, you can guarantee that project team members will take holidays – in discussions about resources, remember these are people! This is for sure a case where to fail to plan is to plan to fail.

Differentiate effort requirement (in days) and calendar time (in days too). To explain: it may take 30 consultancy/team days of effort to complete a work stream. But can everyone work every day? If they do, does the intensity allow enough time for others to test, to learn and to cope with change? Slow it down, space it out. Take a break between phased releases. Plan for this.

Please expect a delay between the kick-off meeting date and the start of implementation. Manage expectations here. There will be a lead time for consultancy bookings, which is very reasonable. If you were in their shoes, would you book up your resources until you'd had the commitment from the other party?

Understand the difference between piloting and testing when you review a draft project plan. A pilot phase must allow time for those involved to feed back to you (as with testing) but also time then to consider, configure and re-pilot any changes that those users suggest. Do you wish for and intend to act upon preferences from your pilot group? Or is it more likely that the project team will intend to make decisions based on their own design preferences anyway?

And that project plan all starts with a first meeting:

Milestone moment – what to expect at kick-off

The first meeting of internal and external project nominees after contracts are signed is often called a kick-off meeting, or more formally a project initiation meeting. Expectations tend to ride too high for this.

It is essentially a terribly friendly hello and a first dive into detailed fact-gathering to allow your system supplier to disappear and come back with a detailed, resourced and (ideally) scheduled plan.

Key question

What's in a PID?

There is not a fixed format for the document(s) that comprise the PID. It should include:

- The project outline scope and context
- The business case
- Governance arrangements: roles and responsibilities, communications
- Budget, timeframes and risks: the constraints
- Information about methodology
- A space for sign-off of the PID

The term Project Charter tends to mean an abbreviated form of PID.

Very unlikely will you come away from the meeting itself with too many answers. If you have done the homework suggested amongst yourselves then this will help. (We found this article from Mindtools which, whilst not perfect, includes a handy checklist download if you want to create a simple PID).

An outcome will be some form of Project Initiation Documentation (or "PID"). The supplier may well bring a draft to the meeting with the aim that more details can be agreed during and shortly after. This is then signed off.

Step 5 in short!

There is no reason why HR as the professional PM and working with professional PM's should not be a great fit. That starts with an appreciation of the importance of planning and controlling projects well and with method.

Projects achieve change. To achieve change that arrives at the results you want from your HR system, when you want them and within budget, you will need a toolbox of techniques that project-thinking offers. Whether or not the internal stewardship of this sits with you or with someone else, there are desperately simple disciplines of day-to-day work that will help you be successful.

Kick-off is the starting gun and you're off! The good news is that your supplier team now have a clear onus upon them to deliver to the agreed plans made. Soon the implementation work will start and how to do best with that is coming soon.

Take one step on Step 5!

Consider how stages will best serve you: invest a bit of thinking time with your more senior colleagues to determine: the most appropriate pace of rolling out the HR systems, the priority of different modules against the organisational strategy, lessons learned about cultural uptake. How much breathing space do you need between? What else is going on? How much certainty of project vision do you want/need?

Step 6 Sorting the Stakeholders – Who is Who in HR Tech

So far the journey of selecting and preparing for an HR technology implementation or development project has taken us into some areas fairly foreign to many a leading HR professional, including last time how to develop a project mindset and in Step 4 all about getting set with your data. Now we return to territorial comfort zones!

Here we look at the who is who of the industry and help you to apply your resourcing, selection and business partnering skills amongst this particular talent pool.

The HR profession is gently experiencing a greater need to engage with stakeholders not only internal but external to the organisation. Technology is a great example of where this is clearly true. You have to work out how best to:

1 Leverage your internal teams' skills

2 Identify the available external talent

3 Achieve the best complement for good working relationships and project success

Having the right professionals working with you to develop your technologies I believe is typically a success factor even more critical than the choice of the technology itself. I trust I'm preaching to the choir in an assertion that it really is people that make the difference.

This guide will help you to understand the options for finding talent and point you towards who will suit you best and when.

Composing a Board and Project Team

Projects need a task-force assigned to them – to control, to manage and to deliver. Go back to last time for a summary reminder of the difference between steering committee agenda and project-work, which achieves a defined change between 2 points in time. The number of people involved, with what degree of formality, choice and intensity will vary vastly according to scale. Luckily the principles and wisdoms of sound project resourcing remain pretty common.

The Prince 2 method offers a useful benchmark about how to set up a project board. This prescribes 3 key roles, which for all but the Executive may be held by more than one person each:

1 **Executive** – the decision-maker, responsible for the business case. Importantly, this person should not be the same as the Project Manager ("PM")

2 **Senior User** – representing the benefits and the user interest. You might want more than one person to be taking this role

3 **Senior Supplier** – the person accountable for the quality of the products (noting that in Prince 2 terminology, "product" could mean service outcome too)

You might not get along too well with the method or, perhaps, its chosen words and phrases, but the concepts here are worth considering as you decide who to appoint on the board.

The Board is there to be accountable, to own the business case and take decisions. They must have the gift of acting as influential champions, providing resources and delegating. Make sure that each board member has those powers and does not need to refer upwards.

Who else do I need on the internal team?

The effort involved in implementing a new system is most often under-estimated. One supplier company I know to have quoted to clients that for every day of external consultancy effort 4 days of internal effort are likely to be called for. I think that's good advice.

Key question

What is the point of a project board? Do I need one?

Having a project board identified I suggest is a vital part of sound project governance. Governance is all about ensuring effective decisions, that result in objectives being achieved. The Executive is the person who acts as ultimate governor.

This is different from project management – about managing and controlling change – where that change is delivered (i.e. done!) by the project team members themselves.

So you need....

- A decider! The project sponsor or governor or Executive
- A manager! The internal PM
- Enough do-ers!

If your organisation is small, you might agree that the person taking on the lead project management meets regularly with their boss, as the sponsor. Ask a senior manager from another function to join you. Ask your supplier to offer a representative to meet you too at regular check-points.

Here's a checklist! These are the doing people and so my list for you is all about verbs, to encourage you to focus on the purpose of each role, rather than lurching for job titles or suggestions that may not ring true within a given methodology. Check you have someone to:

- **Manage and control:** remember (and see **Step 5**) that you will need an internal Project Manager even though your supplier is likely to offer you one too
- **Prepare and share information:** external implementers and consultants need people with time to explain current processes and preferences, make small choices, provide data, attend workshops. This is an easy way to start to involve your key HR users
- **Take the time-strain:** there will be some time-consuming jobs. Preparing and gathering data is one of those. So can be the administration and organisation, which tasks don't necessarily prove cost-effective in a PM. Who is going to write in-house documentation and communications material? Think in advance, when it comes to personnel data, whether you are prepared to employ temps and don't leave this option to a last-minute crisis!
- **Test:** user acceptance testing ("UAT" – much more about this later on) is surprisingly difficult. Potential users must systematically check that technology has been set up correctly. Suppliers cannot and should not exclusively check their own work.
- **Learn, train and communicate:** those attending workshops and consultancy days will learn most directly. Training days will be offered. Those most accelerated in understanding will wish to go back to the business and train others.
- **Feed back:** who would be good, from start to finish, to let your project team know how they'd like the technology to look, feel and process? Find sample users at both senior stakeholder and more majority groups. Providing constructive views and preferences is different from systematic testing.

TIP

Project Support **is a phrase you might come across or use yourself to cover one or several of the above jobs to be done. It has various guises and I wouldn't worry about that. The key point is that it is always worth clarifying expectations about who is going to do what. Find out below all about external partner expertise and note that, when working with people you don't know, this point is of course even more true.**

TIP

***Engage, engage, engage!!!*... Or not so? Is it possible to involve too many people? In this context, we believe in the saying "too many cooks...."**

At project board level, for effective decision-making involve as few people as possible to cover the purposes required. At team level, smaller groups make for the most efficient decisions at their micro-making, which is what consultancy days prove to be all about.

Engaging the External Experts – who does what...?

... And read on later for more about who does what well!

So far we've worked out who you might find within your own organisation. Harder is the question of those who (a) have expertise you need and lack and (b) are not under your direct day-to-day control. Add to that those partners' position to (c) charge you money and appreciate why I'm keen to be sure that everyone approaching technology work has some clear advice about who is who, and who does what well and when.

The contract you have negotiated typically comprises that about product and that about professional services (note that systems limited in scope and "off the shelf" may not be associated with any professional service plan). Those professional services most likely include:

- A **project manager** – check back to **Step 5** for explanation all about this role and why not to expect it to be comprehensive!
- **Consultants** to carry out configuration – companies tend to distinguish their consultants' job titles with prefixes based upon:

Modular specialism (BI or HR or Payroll)

- Experience (Senior, Lead or Strategic – the omission implying any other)
- Degree of technical development skill (Implementation, Application or Technical)
- **Data migration** or **Business Process Analysts** are specialisms often offered separately
- **Project support** *(and see above)* refers to professionals of lower skill level technically who may help you out with project tasks, if you are under-resourced. Distinguish this kind of project resource from:
- **Support** – technology providers have teams available as the first point of contact for enquiry and reporting of faults. There is significant variation between the level of service offered here. Some support desks (or service desks or helpdesks), now available as online chat in many environments, are little more than a triage system to paid-for consultancy or those more experienced at second and third-lines. The best are prepared to offer training over the phone, and advice and guidance based on a high degree of experience
- **Trainers** – to come onsite or offer remote or vendor-hosted training sessions

We do not linger long on defining these roles, as each company crafts job roles and titles differently. When you are introduced to roles at kick-off, my recommendation is that you ask your supplier to explain the expectation you should have of each person and what they will do for you.

... And who does what well?!

There are sources of expert help other than those internal to your organisation and those on offer from your technology provider.

Independent experts are often engaged in times of crisis or loss of faith in a provider's service, but it's wise to be open-minded to the implications of your choice of professional resource at all stages. Too much faith is often placed in the word "consultant". It can be hard to get good advice about the choices available.

Step 6: Sorting the Stakeholders – Who is Who in HR Tech

Here are some broad clues about the scenarios in which each type of professional helper-outer might be best for you:

Consultancy provided by your technology supplier	**Best when:** service has been good, there is a moment of key dependency, if you are wishing to rely on that particular company for managed services. In pre-live stages there is always some part for the supplier company to play **Disadvantages:** cost per day, a lack of objectivity or whole-of-market experience, often difficulty securing continuity of personnel or long lead times. The best consultants are in demand
Interim or fixed term direct engagement (as an employee)	**Best when:** projects are long, internal communications and meetings load is a significant part of the strain, budget is limited **Disadvantages:** specialism is likely limited and you will need others too at least on occasion, risk in one person, independence is soon jeopardised, authority may be hard to wield
Independent self-employed consultant (e.g. sourced via LinkedIn or similar)	**Best when:** just one key specialism is missing, reputation is well evidenced, you have a back-up plan, budgets are limited, an independent voice could give vital influence **Disadvantages:** risk in one person who must always look out for next contract opportunity, limited range of skill-set, calibre can be hard for the HR lead or non-specialist to judge. Consider off-payroll legislation
Consultancy via an IT agency	**Best when:** you have a strong relationship with the agent and can clearly articulate the expertise required **Disadvantages:** akin to those of the independent practitioner and with extra fees, but with some mitigation of risk on referencing
Third party professional services consultancy	**Best when:** objectivity and independence is valued, high calibre sought, quality is more important than immediate cost, the technology provider does not offer adequate service or availability. Engaging a company rather than individual spreads risk, especially if your provider recommends partner companies **Disadvantages:** lesser known – you may need to research and investigate harder to understand who is best, cost per day will not be significantly less than those of your technology provider

Key questions

When should I employ someone to my project directly?

Delivering a sizeable project inevitably means that the bottom line headcount you need is temporarily increased, expertise notwithstanding. We note above that often project support is under-resourced. There is a plus of a project team all with all the right insider know-how, as well as interest in the HR system longer-term, with the demand this will have of their time.

Balance this against a realistic assessment of the demand on their time. Last minute hiring of temp workers could risk quality, as well as place sensitive data in jeopardy; last minute addition of emergency consultancy is expensive for some jobs (e.g. data gathering or cleanse, or copy and paste work!) but in other jobs proves cost-effective (e.g. making light work of preparing documentation sets or data migration).

If you second someone internally, move day-to-day tasks to the secondee and use the team member with the long-term interest in system outcomes to work on the project.

Many HR leaders employ interim project managers or consultants for a fixed term contract. See below some of the pros and cons here.

Step 6 in short!

The people you engage to manage and deliver your project, both internally and externally, may make more difference to the project success than your choice within a product market tier of HR system itself.

It would be great to see the natural strengths of HR leaders navigating the professional networks with greater confidence, but a confusion of job titles, technical jargon and lack of familiarity with the role requirements themselves gets in our way. Most people get resourcing of HR technology projects wrong!

The most common mistakes are:

1 Assuming you have no choice
2 Relying on one individual
3 Under-resourcing the team of do-ers, including missing the long-term need

The simple explanations above will help you prove the exception to the rule and enjoy some confident relationships.

There is plenty of advice to come in later steps of this series about getting the best out of consultancy time, engaging your stakeholders and working as part of a user community of technology.

Take one step on Step 6!

We end each part of this book with one key thing above all to take away and do. Here it is to clarify role expectations. The related role title in each case will differ slightly but find out what you can expect of:

- Each member of the board – the extent of their authority
- Each member of the project team – the extent of their experience and time available
- The project manager from your supplier
- Each (named) consultant from your supplier's team, breadth and depth of experience and scheduled dates
- Service or help-desk personnel – and others ready to help with advice and guidance

Are you comfortable you have assessed any potential for skills gaps?

Step 7 Implementation – The Building Blocks

At a half-way point in our series tackling the steps to smooth success with HR technology implementation, this step gets stuck into the territory of "in project" mode.

All too often this feels to be the prerogative of your product supplier to lead on, whereas that leadership could and should be yours.

Here is a recap so far:

1 In **Step 1**, we underlined the value of the business case as a baseline and compass for you throughout

2 **Step 2** helped with a navigation of the HR technology market, hence some of the key choices in system selection

3 This is supported by a guide to the right process for selection, questions which we're keen to encourage as separate from the choices made within that process

4 Having chosen a product and supplier(s), in **Step 4** there's help with the homework you can do to get ready to start and:

5 How HR professionals can adopt a project mindset to create a control around change and work within project method – that's **Step 5**

6 Last time we gave you some advice about the types of professionals out there and who to use when and how

Implementation used to take the lion's share of the calendar timeframe for the adoption of people technologies.

Typically this is still true, although agile deployments as well as increasing complexity of selection choice and integrations begins to change this and it is not necessarily the way of the future.

That said, the building blocks of first phase implementation is where you will need a good deal of your guidance.

TIP

Many of those typical mistakes we see organisations make during a first phase derive from this unquestioning approach to working with advice. Play an active and inquisitive approach to the system design, focusing always on impact of choices. This is not at odds with having great relationships with the consultants and colleagues around you! It is the win-win style of project work.

The usual way to manage this is to accept that guidance from your product supplier as it's offered to you during consultancy included in project – and surprisingly unquestioningly. Do not follow your supplier's lead but lead your supplier!

Generic advice about design and configuration choice specifics is not sensible to give. Each project has a unique context. So this step shows you how to:

- Make contextual choices about configuration
- Work well with consultants (and see **Step 6**)
- Be sure you are appropriately internally resourced
- Avoid the typical mistakes

Configuration and customisation: the choices about design

The larger the scope and scale of your context and the system(s) to be implemented, likely the greater number of detailed design choices to be made.

Beyond the smallest products, little is "off-the-shelf". Work together with the implementation consultants to make these decisions to be sure that they deliver the right result both at first go-live and with a future-proofing.

Key question

Is it better to design the system as fully as you might want to use it or to keep it simple? Such an apparently simple question is very tricky.

More commonly the greater pitfall is to aim too high and achieve too little of it, as opposed to setting lower sights and arriving at to time, to budget and to good effect. Keep it simple and get it right before you move on.

But if you do, then set up the project team and Board expectations that there will be a revisit. Avoid the (also common) scenario whereby those good intentions for phase 2 become swallowed up in the day job with a discipline to keep tight hold of diary flags, milestone meetings, allocated budgets – and the invaluable exercise of assessing progress achieved against business case.

Understand the difference between configuration and customisation. Configuration is the use of system design options to allow a natural use of the technology to suit you; customisation is design that is un-natural to the technology to suit you. Customisation modifies the product; configuration does not.

In general, go for design solutions that use configuration rather than customisation.

Customisation:

- Leaves a solution that end-users cannot see nor readily change
- May need updating when the natural product is further developed
- Incurs more costs up-front to achieve
- Support professionals may be less happy about 'owning' the project if there are faults
- Suggests you are tending towards replicating what's gone before in your organisation, rather than using new technology to create more natural processes

That said, there is a place for customisation at times. Just please take care to appreciate when your organisation's needs really are different from the majority for whom the system has been developed.

The most important thing about system design choices – and the process of making them – is that your organisation is fully understanding of the impact of those choices.

Keep actively asking and exploring. Precise blueprinting is of debatable value. Consider if you really have the know-how as a client, before you get stuck into implementation further, to understand the impact of the options blueprinting asks you describe. You could instead focus on securing fuller configuration documentation later on (see below).

Working well with consultants

In **Step 6** we explained that there are experts available in quite a few differing guises and whichever the choices you make there to resource at the specialist level the project is sure to involve days spent with those experts working alongside you and your colleagues.

The role of the visiting consultant, particularly from the technology supplier and as scheduled as part of that company's project plan, is often both assumed and unquestioned.

It is however worth considering how to make the most of that consultancy experience in the interests of success.

Here are four key points:

Avoid the practical concerns about scheduling and associated costs.

Our advice is to press on with an insistence until you arrive at confirmed bookings or availability. Asking for named consultants, ideally with a point of accountability as a lead in that team helps. Lead times and discontinuity are big industry issues. You need real names and real dates or guarantees.

The consultancy value is not limited to scheduled dates or times of work.

Prepare and follow-up well. Give a scope brief in advance (and see tip 4) and note down your own expectations for the day/call/meeting/remote session. Capture the work done by reviewing documentation of the consultant's design choices. Agree at the outset on a common understanding that any write-up will take.

TIP

Try not to tie consultants up with meetings. Bear in mind that every hour spent in meetings or update calls is an hour not spent applying that specialist time elsewhere. Much meeting time proves to be for internal debates. Strike an effective balance between making sure the right people are updated and decisions made in the right forums and allowing those appointments to crowd an expert's diary.

Use classic interviewing skills

Remembering how vital it is that configuration choices are made appreciating their impact. We appreciate too that here at times you may feel clueless.

Roll out the interviewing skills that are classic for HR pro's! For example, some generic, open and funnelling **questions** might be:

- *"What are the consequences if I take your advice there?"*
- *"Does that have later implications in other modules or project stages?"*
- *"Where else will that issue come up? Where else will I see that appear?"*
- *"Why do you tend to advice choice A over choice B? What if I were to take the opposite option?"*

The half-decent professional will explain nearly as far as you need, but many not quite. Unfortunately, some not at all.

Your consultant is your friend!

Be conscious if you find your approach unhelpfully bipartisan. Sometimes it can feel that, as consultants, we are being put to the test by our clients.

You, your colleagues and your consultancy team are all human and to get the best out of all we can all be encouraged to do our best for you.

In practical terms, We recommend staying with the consultant if onsite for as much of the work done as viable. **Work together.**

Internal resourcing...

...where six of one can become half a dozen of the other.

The article about the project resourcing offered a checklist of the internal skills you will need to cover.

Later in the guide I'll address more about how to engage stakeholders too. Quite a few implementation difficulties arise due to internal resource management:

- **Underestimating the overall effort required in hours leads to "our end" delays.** Seek guidance about time to be put in. Allow a contingency in making that time allocation. Note the difference between the passage of calendar time for your team and working days that apparently fall between consultancy jobs done by others.
- **Taking a short-term view in your resourcing** to cover the project plan timeframe only makes it very hard to end a reliance upon external help with intensity. This should taper off. That means from the start working out the HR system support role(s) needed. *(In final articles I would like to look at for you whether self-sufficiency is the right aim for your BAU.)*
- **Over-involving the project team ties your operations up in knots and results in much time wasted;** under-involving nominated project team seconded is demotivating. I suggest asking individuals whether they are involved enough for their liking. If someone

Key question

How much comes "out of the box"? What if I want or don't want "vanilla"?

These phrases we have heard a lot from clients introducing their aims for implementing HR technologies. Most often the motivation in the ask is ease, speed and cost control. Sometimes we're admiring that the question comes from a real desire to hear about "best practice" from an objective view, unfettered by the past.

From the supplier side, look out for phrases like "pre-configured" or "business pack" (and as these become well-worn companies invent new words to promote similar concepts). More informally techies talk about things being "pre-canned", "pre-shipped" or even the old "plug'n'play".

Systems differ in how much is already set up for you. The simplest cloud solutions, delivered on a SaaS basis, include few remaining choices. If you are working with a more complex product then expect nothing out of that box and to receive an empty shell to populate with, for example, organisational structure, processes and much page design. Likely there will be some default examples of design, such as a recommended set of security profiles to be cloned.

Evolving from this empty shell, suppliers have created associated products – available to you at lower cost – which include some of the configuration done for you. This limits your options, but yes it does reduce cost and time to go-live. You can establish the facts with surprisingly simple questions about how many default profiles, reports, processes etc are available to you and how many options you have left.

In short, avoid buzzwords without exploring just what is meant.

wants more, then use delegation as an opportunity to step aside rather than double-up. That is the strong vote not the cop-out!

Don't allow concerns you have for external help become just as much your in-house problem.

- **Recall how best to use the project plan.** This is *your* plan. As you work through each project stage and plan the next, be led by the pace you know that your organisational context can cope with absorbing. You do not need to accept something that is off-the-shelf
- **Discuss analytics (MI or reporting requirements) from the start.** If the implementers understand the design of the data you are going to want *out* then they can advise you to make sure that the data goes in such as that's possible
- **Reporting is an example of a part of your HR technologies that conceivably it may be right to adopt a tool other than your core HCM solution.** At the time of writing, the capabilities of various product types is such that it is no longer always true that the fullest use of a core system's internal integrative offer is right for you. *(Look back to a navigation of the market for more on that point.)* If you aim to avoid (a) manual process (just ask your payroll team about retrospection to understand why!) and (b) too much customised design then there can be creative, automated solutions less obvious. Of course you'll need to ask the experts outside of your core suppliers team if you have a clue that this could be true

Step 7 in short!

This step provides some building blocks that smooth you to success in implementation. It's deliberately placed halfway through this series because vital is that you regard tips here in also applying the concepts introduced about:

- How to work with project method
- How to work with technology professionals
- How to work with your data
- How to design your processes

An important thread is the ownership you can take of your implementation phases. Do not step back from being the leaders of your own new change mission, assuming that it can be done for you. You risk the right result.

A first stage implementation can span 12–18 months and even those most agile in deployment are likely to be working for a good quarter year period.

Consider the number of decisions that will be made along that way. Make those your decisions. That is why I offer tips about an approach rather than advising you to adopt a process that looks like this, to buy this particular system or to tick this particular box if you do.

Context is everything.

Use the tools to their best advantage – configure naturally. Work as partners with consultants during their visits, documenting carefully and securing an internal team set up for ongoing in-house know-how.

Some of the particular questions during early implementation still warrant closer attentions.

Take one step on Step 7!

As you work with the experts, nail your own way to understand the impact of design choices you are making. There is no harm in your form of a stuck-record technique for doing this, to get to the bottom of the effect of choosing between options put to you.

Data objects, process or structure design elements rarely sit in isolation – behind the scenes configuration choices have an effect back to links between and data contained in data tables. That's why understanding impact is so key.

I have given some suggested opening questions above. Probe into the effect, for example, on field visibility, security, other processes, system space left available, reporting, upgrading and support.

Step 8 Testing Times – UAT, Test, Pilot and Parallel Run

Testing the design and build of your new people system can bring you back to some of the thrills and spills of those product demonstration beauty parades (that were the good days of your system selection. Seeing the system come to life and for the first time in your own hands is really gratifying after intensive work.

From a professional perspective, the testing process can prove frustrating. As consultants, we find that a lack of familiarity with this structured exercise causes an unnecessary waiting game, as we work together to arrive at sign-off milestones. Ultimately this means late go-live dates and budget over-runs.

In this step we look at what the different types of testing are, do and how therefore to approach each. We will look at:

1. **User Acceptance Testing** – the difference between "UAT" and Quality Assurance
2. **Testing and Piloting** – what's the difference?
3. **The Parallel Run** – the rigour, the realism and the results

To read some more tips on a rigorous project approach revisit **Step 5** of this series and for advice about handling the chunky implementation stages of the implementation journey, of which testing forms an element, go back to **Step 7**.

Let's make testing less testing for all and instead a fast-track to smooth success!

User Acceptance Testing: how to use it, how to accept it

User acceptance testing ("UAT") **is:**

- A formal part of testing which should be structured and recorded
- Proof as to whether the new system delivers to a specification of the business need
- Your opportunity to decide whether to accept and sign-off configuration work
- All about the organisational context

User acceptance testing ("UAT") **is not:**

- The first stage of testing a system
- Proof as to whether the system delivers to an out-of-context technical specification
- Your opportunity to add more requirements into scope
- Something you can ask the product supplier to do for you

Key question

Where does testing fit in the overall project plans?

Test too early as a project team and you'll test again; test too late and you'll likely face a choice between accepting either delay or compromise on outcomes. Testing has to sit neatly between the point at which someone believes they've done their bit and someone else needs to check it over

It's important to know what to test. Remember that I recommend a stage approach to the project. Package the full scope of the system into neat "product" parcels for formal sign-offs.

Take a practical approach to mini, informal tests (e.g. of a workflow or profile design) after each consultancy exercise so as not to lose the moment where memory is fresh. Ad hoc is allowed as an extra!

The first stages of testing an HR system design and configuration will be carried out by the developers and their quality assurers. Systems testing will have happened for any one piece of project-specific build.

The bigger testing exercises that developers carry out are prior to release of new functionality for their wide customer base. In an SaaS context these upgrade releases and bug fixes can now feel painless to you as the end-user. When testing is done by customers at the end of that system testing it is often referred to as beta-testing.

At the UAT stage, the implementers have taken their job as far as they can. They now need you to apply their build and to validate whether it works to do what it should in real-life scenarios. You know those scenarios and the supplier testing team does not – they are keen to know whether the ready-to-test technical spec works *for you!* Think of it as somewhat like the difference between laboratory testing and clinical trial.

UAT: what to do and how to do it

- Write your intended test plan (test script) when the requirements analysis is fresh in mind. Get ahead and have this ready at project start in preparation for selection – to be refined later – or as one outcome of a business process review
- Test scripts can be very detailed and appropriately so. There are templates available for download to see examples. The essence of the plan contents describes:
  1. Objectives of testing
  2. Business scenarios and functions in and out of scope of testing
  3. Roles to test, approve and receive results
  4. Pass and fail criteria, against each item and overall

  You may wish also to describe assumptions, risks and key points of method.
- Engage your internal project team to carry out UAT. If you try to involve other functional team members, it could simply be too hard to be efficient and you risk that a less-than-perfect result at this stage jeopardises initial reactions when going live later. To stress, do not ask your supplier to do the job for you. If you wish to involve external advisers (see **Step 6** on the who is who), only count on those you are sure have a sound grasp of the real requirements of the business.
- Allow plenty of time. Quite how long is contextual and understand that even on the most modest scale you are likely to need to dedicate more than one focused day. Quite often I see product suppliers offering plan examples which include a 2-week window for UAT by their customer. To plot through different circumstances end-to-end and to record results takes a surprising amount of time.
- Document results carefully and diligently. The format to which this is to be done should be agreed in the test script (and shared with those who you'll give that back to) and it is absolutely essential that every scenario tested, outcome observed and score (the pass or fail, or the categorisation of the importance of error) is completed. Ask the consultancy team what evidence you need to be able to produce, typically a screen shot to accompany your notes, ahead of time so that you don't have to repeat.

TIP

Test scripts relate only in part to a particular system solution. If HR technologies are a significant part of your day-to-day departmental operations you may well be wise to invest time in devising a generic test script that can be applied in any one case (with some refinement) of new software deployment or upgrade.

Key question

Is the supplier involved at all in UAT? Do I have to do it all alone?

No, you're not alone. Whilst we offer no wriggle-room around getting out of your user role, do expect your consultants to support you. Largely those experts are waiting for your responses, so keep in touch to report results throughout. You can be efficient with time needed for repeats of the UAT period to limit how long the whole process takes.

It is also fine to ask for guidance about writing your script [see above] and to expect a low-key introduction as to where to start in this first trialling. But have confidence! You do not need to have received full training in how to use a system to do UAT.

Note and report failures. Overall success may then be defined, for example, as "X% of test items have achieved with no problems classified as high or medium on impact – and with 100% of items now tested." Be sure that all those items that do not pass as individual tests have a decision attached to them as to whether to fix or to accommodate. The exit point of the UAT exercise is then the signing-off of the scope of that testing with a concluding "pass" result.

Testing and Piloting

The technical specification has now been tested by the professionals; the functional specification, against the business need, validated in UAT. In theory, this leaves you good-to-go towards live use of the HR system.

In practice, most wish to see the organisation have a further "test" opportunity by sampling what's going to happen when the technology is in live use. The opportunity here, and the associated risk otherwise, is all about understanding usability and experience, as well as gauging cultural or communications issues. Another motive for doing more by way of trial is a test of the strain on the system as volumes increase and performance as part of a live IT infrastructure.

When we looked at the role of HR as the professional PM we distinguished planning for a test by your organisation's end-users and a

pilot. These are my words to underline a very useful point of pragmatism. In both cases, you are identifying a sample group and asking that they try out the technology. The difference is what you intend to do with their feedback. Here is why:

Imagine a sample group gives me feedback about how they find using a new tool. What might I learn? I might learn about things users like and don't like about:

- **Look and feel**
- **The process involved in their functions with the system**
- **Technical system performance (speed, reliability etc)**
- **Often most strikingly, what they don't understand or find easy**

You also gain evidence about more quantifiable results here, such as how long it took users to work through a process or a process with volume

You then need to decide which of those types of feedback you're going to respond with either (a) changing things to remove any difficulty or (b) working with and around the concern. For example, you could use the feedback to guide how you devise a training plan [and see the next part of this book].

The key point is that with the first response (the change) then you need time to re-iterate design and re-test. In the second case you don't. That's a practical point when it comes to planning.

Being clear about the purpose of sampling use amongst your wider organisation in either way will help to ensure users are not frustrated. Let those users know what you do intend to do with their feedback too.

The Parallel Run: a realistic run towards results

Parallel running (i.e. concurrent use) of existing and new HR and payroll systems is the safe transition period before letting go of old tech. It is in payroll where this safety is really called for as a true final test. In other areas or types of system, the imperative is not there and keeping a legacy system going is likely to be about practical concerns, such as to help you manage and be sure of your data migration in its completeness.

We focus here on advice to the uninitiated leader or project colleague about how to run payrolls in parallel to perform that last true test with the right degree of rigour which avoids undue risk without overkill:

- Received wisdom is that two payroll periods are used. Consider three if things tend to be more variable period to period. One pay period alone could be a risky short-cut but viable in the most static of cases
- Factor in the time of year. Consider seasonality, for example of starters and leavers or of variable data input. Whilst RTI has diluted the issue, year-end requires an extra degree of

Key question

How should you choose your pilot group?

There is much debate about whether pilot groups should be a representative average, your most supportive (and yet helpfully critical) friends, or the really trickiest parts of the business to reach. It is very common, for example, to see the HR and Finance teams engaged as the pilot group.

A group is identified by location, departmental function or sometimes by association with particular management leads.

Our recommendation is that the two profiles most likely to help are both the most ardent supporters and those most resistant (or in complex areas). This is because both groups will respond – albeit with differing motives – with a comprehensive battering of use and give you full feedback. The last thing you want is a non-response.

Choose a pilot group proportionate to functionality of technical scope rather than necessarily organisational size. You need big pilot groups to test the volumes and complex array of scenario for functions associated with time-recording and absence, but basic self-service or core functions in HR less so.

change. Your period of choice might well be the new tax year first period for parallel rather than setting the new system live and turning off the old one, as can be the convention.

- Be realistic. To reconcile to the penny is not being realistic. A tolerance factor for discrepancy is needed throughout testing stages and so best identified when each pay element is designed, to be used consistently throughout. Decide on a tolerance for each element and then the total to tolerate suggests itself. £1 on an hourly rate is wildly different from a £1 total net payroll result!
- Test the system, not your sums – manual corrections are not the answer to "fixing" discrepancy. You could deal with manual interventions and cash lump sum entry by working with the same tolerance factors, but better is to create the accurate data at source. Even the most seasoned payroll pros may need to resist the urge to override a calculation.

If parallel run time tests your patience, then we urge you to bear with it. A maverick view, and one that in theory does hold water, is that adequate scenario testing on the new system with QA and UAT renders parallel payrolls redundant. It is the rare Finance professional happy to accept that as a plan.

Step 8 in short!

The types of testing are a point of considerable confusion and worth clarifying. Distinguishing the purpose of testing the developers do, user acceptance testing and testing by the business more widely will help you to make the right choices about how to plan those activities.

- **User Acceptance Testing** does what it says on the tin: users (the project team) accept (sign off) the scope of that testing.
- Whether or not you are truly **piloting** depends on how much choice you really want to give the organisation.
- **Parallel running** achieves the specific rigour of the payroll function to an appropriate degree of risk.

Enjoy the initial excitement of getting your hands on your new technology for the first time "for real" and, armed with advice, allow that to extend into smooth testing success. When the sign-off milestones are achieved, all are set to progress into promoting the results.

Take one step on Step 8!

Please do not side-step your project team role on UAT. Please take it in your hands to know and to apply your own business context for real-life scenario-based testing. The system developers simply cannot do this well. No professional is performing an inadequate service to you in strenuous argument against taking that on.

TIP

Any type of testing starts to make clean data becomes important. Ensure development environments and those used for training (both forms of playground!) are separate. Keep user testers happy by preparing test grounds with complete and accurate data. Beware the particular annoyance of spurious workflow email output! Attach test system email addresses that are false, or those of the testing team, or on divert to a single mailbox.

Step 9 Talking about Training and Communications

This part of the guide is all about getting it out there! Training, communications and engagement are happy activities, where a project team can share the successes you began to enjoy within the team with the testing phase, explored last time.

Marketing your HR system and your technology change project is a tricky topic to write on as an independent professional.

Why? Admittedly we generalise, but HR practitioners and internal PMs with an HR background tend to be adept at the 'soft' side of marketing, the cultural requirements and organisational politics, which those with an IT (and sometimes Finance) background can neglect.

However, they may underestimate the requirement for 'hard' education and information that is technical and practical, which trained systems managers or those with an audit or balance sheet mindset cover without question.

This we attribute quite simply to what our day-to-day functions usually have us doing. We cover here advice appealing to different mindsets.

Engaging End Users

WE mention that change management can at times be over-*emphasised.* This is a negative only if it convinces you that you have done your bit on communications at a cost to the practical stuff.

Engagement is of course a key factor in the success of uptake and response, both initial and ongoing, amongst employees and potential employees (who are the many here as opposed to the few!).

Introducing new people technology is a change experience itself. It is very commonly one element of wider change programmes too, perhaps focused on achieving a cultural shift, a digitalisation of the workplace, greater empowerment of team members and their managers.

Perhaps your context is more challenging to the feel-good factor – for example, if you need to overcome a restructure, merger or acquisition scenario then somewhere systems will be in need of change.

Change management per se is particularly important to address where wider culture is significantly implicated. I assume you have some help in these scenarios. *(There is more about culture coming soon in **Step 10** too.)*

Key question

Is it the 'soft' side of communication or the 'hard' technical education that's more important?

Of course we wish to answer that both are absolutely vital to project success! However – and it is a controversial view perhaps – if we have to choose, then we suggest that it's the practical stuff you want to worry about. A personal bug-bear is the over-emphasis we sometimes experience on change management. We can justify the point:

Training and communications matter because of what happens after not during the activity: questions about enjoyment, uptake and experience improve life and can be improved upon; questions of how to use technology correctly (particularly by super-users) can *break* a project. These are close to hard and soft issues.

Here are a few simple considerations if you need to address change management about a piece of HR technology in isolation:

- **Brand:** most complex systems allow the organisation to incorporate 'style sheet' designs, as well as chosen images, logos and colours across the system. This is worth doing. Some organisations choose also to brand and name the system something they've chosen themselves. I think this can lead to confusion. Unless you have a strong people brand, then I'd avoid it. If you do like the idea, then it can be a fun way to engage if you offer a competition to pick a name!
- **Consistency:** in every section of this step I address timing. Timing helps you manage expectations. Avoid a one-off marketing campaign that comes to an end too early. Aim to start getting messages out there at a time when you are confident you are able to support a continuing flow of updated information. Go for information by drip-feed.
- **Activities:** as well as pushing stuff out (presentations, messaging, postcards, YouTube video, publications) try to pull stuff in.

Use the onboarding time as a way to get an early interaction. Drop-in sessions are useful to offer for hands-on experiences, even if attendance is apparently very low. Structure workshops and roadshows inviting activity. Make the option to question and contact visible. The classic "you asked, we said/did" is tried and tested. Start as early as you can to get new data you gather from the business entered into the system itself (note: there are ways of making parts of the system feel live and real when they are not if this seems dangerous!)

- Involvement: the obvious opportunities to involve end-user employees and managers, for example in product demonstrations and in piloting are not necessarily the right ones to take. Check back to the advice I've offered so far about the aims and objectives of these crucial activities.

And our tip: these days most workplace contexts need to worry less about whether there will be resistance to technology (this was the conversation of a decade ago) but whether the employee experience of technology will meet demand! I encourage you to question whether you are matching that demand as you plan your communications.

Manage expectations.

Making Super-stars of your Super-users

We use the term super-user to mean a key person with functional responsibility for working with the HR system as a core part of their job role, for example within the HR, payroll and recruitment teams. You might have one or more systems administrators too. Training those people appropriately is a must.

The *what* of training suggests itself according to scope of technology and role; the difficult questions are *when* and *how:*

When to Train

Typically technical training is done too early. Product suppliers quite often place training days right up-front in a project plan – before there is a usable product or even before that configuration work starts. If this happens, sometimes an organisation will need to re-book the same team onto repeats, at significant extra cost. We support strongly those suppliers who offer (included in your deal) refresher opportunities.

You can overcome this by training in early days only those who need to give input and only to the extent of that need. Help by explaining this approach to those people. For example, you may need the project team to complete data files or to make decisions about drop-down lists or processes, which require a preliminary understanding about what the system is going to do.

TIP

We think the optimum time for in-depth training is at the earliest point where there is a usable system (whether test or live) that those users can immediately return home or to desks to try out. Learning is best retained with plenty chance to practise.

How to Train

Understand that there is choice. Your supplier will offer some kind of standard training and usually that is in the form of at-the-desk or classroom training by a trainer.

It is usually done in a small group of between 6 and 12 delegates. Training delivered in your own building tends to be charged on a per-day-per-trainer rate (with a cap on delegate numbers) and on the supplier's premises on a per-delegate course rate. At the moment costs of training seem to be slightly reducing, which is good news as they have been inflated.

Training of this nature is fine where you do not need something tailored and works to that standard agenda. It is not bad at all for an introduction to a system nor for legislative or release update, for example.

Your training needs something different when:

- The agenda needs to equip for a specific role including business process
- A super-user is beyond a basic level of competence
- Training a super-user who then will train onwards ('Train the Trainer')
- You have limited the scope of the product on offer that your own people will get or
- The system is highly styled, customised or configured to the maximum!
- You need the delegates immediately after to perform their job role using the system

You can see that this covers most training requirements. Achieve a bespoke training offering by:

1. Checking that your trainer is a fully-skilled Consultant (and see the part of this series all about who is who in HR technology).
2. Being prepared to put some effort in to agreeing in advance on an agenda, but leaving some open exploratory time too.
3. Limiting delegate numbers and finding a forum where you can be using your own system rather than watching a sample display or using a system set up to look like a trial/example organisation.

Structuring your Stakeholders: an HR technology communications plan

Do make a plan to communicate with and involve all of your project stakeholders.

Now you can go to town on this – and certain environments, where scale is large and methodologies more formal (have a read of an earlier part exploring project management styles for HR) this is warranted.

Quite simply you don't need to. You *do* need to have a straightforward plan that notes who you need to involve, how, when and why. Regard relevant stakeholders as those with an interest in the project and with a significant degree of impact and influence on success. The risk if you do not make a clear plan is less likely to be that

Key question

When do you stop communicating about the HR system?

Never! Some of the most neglected aspects of training and communicating about people technologies are once the project is over. There are continuing changes to the technology itself with new releases, changes to your processes of working with the tech, changes amongst the population who need to use it.

It is not sensible to muddy in your project stakeholder communications planning some of the enduring requirements of, for example, working with your supplier or onboarding new super-users, but you do need to be appreciative of this consideration to get set up for that to be effective later on.

interests are missed, but that the questions of timing and consistency are not addressed effectively.

The second reason to make a plan is that the planning process for stakeholder management serves as a framework for logical thinking about what the different interests are.

Do not forget to attribute an ownership of each communications or training element included.

Project Board	The business case is your clue here. Keep this in focus.
Project Team	This is likely not be the same group as your super-users. If it is, then note that each will have different kinds of interest
Supplier(s)	Don't forget them. Lack of information about your part of what's going on will help no-one.
Super-Users	Here both 'soft' and 'hard' interests are extremely important. This is the area of the plan where you likely need the greatest detail.
End-Users	Prepare to be surprised at the interest and make few assumptions...

Key question

What do employees most want to know about HR systems they will be using?

To answer in one phrase, I say surprisingly little. Short is often sweetest. In my experience the demand for information about new technology offered to a workplace needs to tell people:

- What they have to do *now* (now only!)
- Tips on how to make that easy for themselves or avoid ready pitfalls
- The effect on their pay, benefits and life at work today. What they will notice.
- Does it apply to everyone? Are both efforts and benefits fairly applied?

In each communication answer these points first if they could be relevant. Get that out the way and minds will be open to find out more, such as what's going to happen next or what things look like.

Remember that a plan is only a plan. There is a much-cited quote from Prussian Field Marshal Helmuth von Moltke that "no plan survives contact with the enemy". That means that external influences may well give you reason to change your plans.

For example, we strongly suggest that you do not follow through with a demonstration of a new system for the first time that's not in a shape that will make a good impression. To postpone a training or demonstration exercise can be a tough call but a sound one. In the last section we looked at, for example, the effective way to manage testing and piloting, which is an example of a project milestone moment where big decisions may have to be taken.

The Documentation that delivers, the Materials that matter

We have said above that practical advice and succinct styles of information matter. We have suggested that frequency and brevity are good things and so is an ongoing availability of information. Create as much as you can that is digestible for the audience, doable by those who own it and mostly digital. Your messaging won't be as effective if you only use old-school, offline methods.

There are two lists to follow for you in later parts of this series with specific ideas about methods and materials you can use: The **essentials** of information source and knowledge-share as part of a checklist for support and safety

The **desirables** you might consider as part of a strategy to optimise uptake, create positive messaging and marketing and deal with cultural concerns.

One way to check off the essentials of technical and practical system materials is to think in terms of business continuity. By treating the systemising of HR technology documentation and materials as an exercise in risk management you will ensure you arrive at a sound and seamless set.

Step 9 in short!

The technical knowledge-share of HR systems implementation and the marketing and communications tend to attract over- or under-emphasis within a project team, at cost to the other. Give deliberate attention to the appropriate complement of both ways in which people must be involved.

Stakeholder interests clearly vary too.

For these reasons, as well as the challenge of managing timing optimally and communicating with consistency, we recommend you make a plan, albeit a simple one. The planning process compels a structure of thinking about how you share project knowledge and information.

You might well be surprised on two counts:

- Employees and managers are more likely to be driving your demand these days, rather than lagging in their appetite for technology: manage expectations carefully.
- Perhaps attributable in part to that appetite for technology (it is taken for granted!), the amount of information to share may be less than seems to the project team comprehensive: keep things short, succinct and addressing key points.

Take one step on Step 9!

Be aware of your natural tendency when it comes to training and communications – or perhaps the tendencies of the team members you've delegated that responsibility to. Which comes more naturally?

Communicating in words about the people elements of a change and appealing to how change affects them? Making communications attractive and presenting well?

If this is more true then focus your read of Step 9 on the sections about structuring your plans and materials above. Look out for the list of essential documents and knowledge-share in Step 11 on support.

Technical documentation and systematic, practical material safeguarding business continuity, project control and making sure team members follow policy and operating protocols?

If you think this is more right then focus attention on sections here about engaging end users and consider the stakeholder list above too. Look out for the list of desirable ideas for communications in Step 10 on go-live and culture.

Step 10 The Go Live Milestone – Getting it out there!

Last time we did the talking part of getting it out there in training and communications planning; this time we're doing the doing. The practicalities and realities of a go-live moment is another of the stages of HR technology implementation that's kept rather under wraps.

Here we will explain what to expect when you go live, how it works and the choices to be looking out for that help to manage that transition milestone effectively.

Go-live is two things:

1 A **practical step** – something has to be done with the technology to make it available to your users

2 A **risk point** – making the new technology live could turn risks into issues

Risks are around how the technology works, but also the organisational and cultural factors associated with the change. Improve your risk management by preparing the ground well with the guidance that I've offered throughout each stage of the technology journey. For example, notice in the advice that follows how:

- The right preparation of data (**Step 4**) impacts first impressions and support load
- The right project method (**Step 5**) makes sure that the go-live risks are assessed
- The right acceptance testing (**Step 8**) is a way to protect against deal-breaker experiences
- The right engagement activities (**Step 9**) will optimise live system usage

Don't wait for your own organisation's go-live milestone to appreciate how the end-to-end stages of HR systems project-work really do rely upon one another. A continuity of vigilance through all of the project stages, with the right advice from the start at system selection and kick-off, must be your aim.

TIP

You may be surprisingly close to a live state anyway. A working environment may be live in all respects except for the publishing of a link to direct users that it's there and where to find it. Or you may simply be changing your use of a test application to being called live. We think that it's reassuring to be aware of how limited the technical task of going live could in your context be, taking away one fear-factor about this key milestone.

The Moment: what to expect and how it works

When a project team makes a web-based system live, this can imply different things depending on the plan made. This rests to a large extent upon which environments, instances or applications that you have had available and how access to those has been managed to date.

These tasks could be on the to-do list for that transition point:

- **Activate** security profiles. Turn on the availability of sets of functions ready for the associated sets of users.
- **Switch around** system settings to make process live. For example, turn on RTI functionality or check boxes to activate email or task workflow.
- **Publish** URL links to users, pointing them to the new live system. Put these links in available places on a permanent basis.
- Manage a **cut-off** point for entry of data from old systems to new. I believe this is the hardest part of what's to be done practically in going live, where your careful choices can make the greatest difference

- In a small number of remaining cases where systems are not web-based, such as very limited local applications, going live may require a **download** or a disc installation by the IT team onto machines

Spelling out what happens when technology goes live shows that the practical steps in themselves are unlikely to be so terribly complex, although they can be intricate. Going live smoothly is much more about what could happen next…

Risk Management: the rub of going live

It is helpful to look at two types of risk as the HR system becomes available to users.

Firstly there are the technical risks. We alert you to those of performance load and to change control. Secondly there are organisational risks in the people dynamics associated with any change. The advice that may be most valuable with respect to culture and behaviour change in your implementation project is how to optimise and encourage use of the system.

In **Step 5** we described how project management and method can work for HR. One of the key assurances you'll derive from sound method, even if simple, is knowing that you have a good grasp on risk throughout. Identified, or worse-still unidentified risk, translating into a live issue is the rub of the go-live moment.

Key question

What is the difference between an *environment, application, instance,* and *installation*? Which and how many of each do you need?

The *environment* usually means the combination of hardware and software application. An *application* is simply a program with a specific purpose. Each time a program runs it is a new *instance.* Only on-premise solutions need an *install* which is simply the installation process-run.

In taking HR systems live therefore, whilst you may find these terms bandied loosely around (about which we would not worry!) it is most correct to say *environment* for hosted web-based systems, and it's a safe bet for cloud solutions too. On-premise or for local applications, *install* is quite right.

Much more important is which and how many to use in your project. For sure you will need some kind of test (or *sandbox*) version as well as live (or *production*). This may become live at the milestone moment. Most likely you need to retain at least one test environment during BAU. Advisable is to have a third space to develop, play around and do any other non-live work that could interfere with pure, like-for-like test comparisons.

If you're feeling greedy and your product suppliers will offer it, then it's even better to benefit from a separate training environment and/or a reporting environment too. The latter is because report-runs place quite a processing load upon your system.

The question of the value of each – if you have a choice – are best answered by IT professionals, with consideration for any extra costs you face.

- **Performance of the system** is the responsibility of your IT hosts, whether those are internal or external. Load upon the technology, due to the number of concurrent active users and processes, is a key distinction between the moment before and after go-live. This can to a degree be stress-tested beforehand if your hosts have concerns and should after be monitored. This is one reason to choose a 'soft launch' or phased approach.
- **Change control** again is about method. Unless you have supported transition into real system use with the establishing of watertight method for controlling further system amends then it is very hard later to redeem that. If you don't have internal best practices on change control to comply with, then seek some advice about keeping a simple dialogue and log of system configuration changes made in an ordered way. You will also wish to have clear records about actions taken in response to support queries and of 'known issues'.

What are the choices to make to help to reduce these practical risks?

The key choices are all about timing. That is both timing to make the new system available to users and timing to manage data.

Timing to make the new system available relates to both performance load *(see above)* and to managing support and the people factors.

Some organisations wish to create a 'big bang' launch moment, which has clear advantages in creating awareness and noise around the system as well as some obvious efficiencies. A big bang will get you to full system benefits quickest if it's well-managed and if you can provide the practical and people support.

Otherwise you can opt to phase your release. Phased approaches are styled in different ways, such as pilots, phased roll-out or 'soft launch'. With partial release of technology like this, you give access to a limited set of users and you may also give limited functions to those users. This offers a rather more cautious way to check out any potential that performance or organisation cannot cope well.

Secondly you must plan how to time your data cut-offs and migrations. Consider two types of data:

Some data is variable and has a time-based characteristic. Super-users and functional professionals must enter payroll data, new starter and leaver information into the old system until a determined date and then into the new. Have a read about parallel running. Take compliance exceptionally seriously on this point.

Some data is continuing and is to be migrated across. Less mission critical to the smoothness of going live perhaps, but to be part of that plan. Remember that data that is apparently in poor shape (and remember the homework of **Step 4** on data) makes for seriously bad press when you do go live.

You can plan for hard cut-off points and one-time migrations or you can require dual-entry into both systems. Choosing a cut-off point within a payroll cycle can be tight and dual-entry is less sensitive to time. But it does require a doubling of effort and resource, so consider your control versus your volume. Where there is doubling of effort at any project stage, back-fill into old operations and make sure that the users of the future get to grips with project and new-system ways of working.

TIP

The descriptions here show that an apparent choice between 'big bang' and phased implementation is not a binary one. That means that you can afford to feel less weight of the decision-making here. Consider cutting and dicing how you make the technology available in different ways based on the types of users, where they sit in the organisation, as well as the types of use they'll make of the tech. For example, releasing a limited set of functions to all users would to some be called a 'big bang', but the same result others think of as a phased stage 1. It doesn't really matter what you call it!

This is a brave question to address and a far braver decision to make. It is easy for me to hazard that it's taken less often than it should be by project leads. Here is an objective view:

We would seriously consider pulling the plug if there are questions around data security. Let's call this a RED stop-sign issue.

We flag as AMBER on whether to suspend release questions around performance load and unexpected changes to the user experience (how the system appears to be working). In these cases you will wish to assess quite how bad an experience there is, or there is set to be. How ready are you to cope? Mitigate with helpful messages and extra monitoring.

GREEN for proceeding with caution is the data. Data needs to be good, but it rarely needs to be perfect. Likewise the user experience should be as expected, but it does not need to be perfect! We have seen client organisations threaten to stop all of their good works because of a small system defect or configuration error not yet resolved.

Please do make your decision based on your own understanding of the implications, examining the contextual detail and seeking advice on that detail.

Planning for Optimum Uptake

Great new technologies offer little benefit if no-one uses them. Make deliberate plans about how you'll make sure that your users make the most of what is becoming available. Avoid a scenario whereby the HR teams have to support users of the new system as well as significant numbers of those avoiding it or working around process created.

In **Step 9**, all about training, communications and engagement, we looked at some of the considerations of culture and managing change. We promised a list of ideas for tactics to engage users and promote the message. Think of these as the desirables of communication strategy in HR systems projects, as opposed to those I suggest in **Step 11** ahead about ensuring adequate support.

Use carrots and sticks too!

Helpful carrots could include:

- Focusing on holidays. Everyone loves holidays. Make holiday-booking a part of any early delivery. Combine with new sickness reporting to improve compliance with the latter.
- Showing clear offsets for any extra effort or direct systems interaction you require of managers or team members. Are you reducing other types of admin load for them? Are you getting your bit done quicker?
- Offer new information. Business intelligence, dashboards, great data visualisation or access to real-time information are often the most winning ways to persuade of the value of new systems, particularly at more senior levels.
- Small-scale fun with direct reward for system use can work well. Target an area of compliance with the greatest business benefit, combined with widest applicability. Or go for the most user log-ins, which could be amongst a team.

Meanwhile sticks are most effective with pay. If you want employees to access e-slips only then simply offer no other means of getting a payslip otherwise. Improve submission of variable pay elements by moving to the month later any temporary pay not entered in time. Sometimes it is worth including use of HR technology in performance management frameworks.

TIP

We encourage promoters of their people systems to think carefully about language and empathy with potential users' actual rather than aspired attitudes. We observe a certain "ick" factor if project team aim to force a shared excitement where it doesn't exist. Change champions are a great concept – and do use them. But don't inject fun-factor if it's not felt. If in doubt, go for straight-forward and professional messages.

"We have aimed to make use of system X as simple as possible. Do A, B and C. Nominated professionals are available in each area/ department/your team to help you."

Drive uptake with desirables of communication!

- FAQs – those that focus on the employee's main interest (tips on this in **Step 9**)
- System messaging and/or commandeering 'company news' features for this
- Payslip messaging
- Some gloss factor! Postcards or credit-card size is nice. Use slide decks too.
- Prominent on-screen advice to save your systems administration team pain (e.g. avoiding password resets or where to find more help)
- User-defined system text fields
- YouTube videos – video formats are great, but do consider the degree of publicity
- Information reaching potential new recruits in starter packs, onboarding and induction
- Help points in all formats, including a person – add reassurance factors into your plan
- Webinar sessions – aim for interaction. Add other material people can access at home on the sofa
- Publish to shared organisational repositories – conversations within collaboration tools, shared libraries, intranets or chat forums
- Roadshows – which could be virtual or geographical

Why not also ask your product supplier what they can offer? The digital design skill and content ideas of these companies very likely exceeds your own when it comes to their own technology and it may be at-the-ready.

Step 10 in short!

Reap the rewards of everyone's efforts so far as endeavours throughout the project-work pull together to achieve a smooth go-live moment.

Reduce the technical performance, organisational and cultural risks associated with making your HR system available to its intended users by preparing well. Make informed choices about how you would like the go-live milestone to happen for the business. Or if choices are in short supply or perhaps not your decision, at least don't feel confused about goings on that are not so very mysterious.

When it comes to the people implications of going live, you can improve uptake with comprehensive communication, change champions and the odd carrot. *But…*

I cannot tell you that now is the moment to relax!

There is a significant amount of leverage on the success of early days that you can pull upon and it's not just all about day one. There is also an important transition to make from project mode to business as usual ("BAU").

Safeguarding early days and better BAU are topics for the concluding parts of this guide.

Take one step on Step 10!

Be sensible about going live. Common sense says no live steps on a Friday afternoon, nor in any form of silly season. Perform your own internal sense-checks if you have a big fear factor by thinking through what (little!) is really happening at any one moment. Perform external sense-checking prior to going live by involving your project team advisors in an exercise in risk assessment, looking at likelihood and impact. What is the worst that can go wrong? The best is smooth success and a quick move into business benefit.

Step 11 Supporting Success – How to Safeguard the Early Days

Going live we looked at in **Step 10** as both a set of practical steps to take and as a moment of risk. We considered tactics to secure maximum uptake and reduce the risks associated with not only system performance but organisational and cultural coping skills.

Just as there is considerable leverage that you have as project managers and within the HR team to increase the chances that going live is smooth, so you have the opportunity to safeguard the early days of running a new HR system.

The early days of running your live people technology – where it's let loose amongst those people - is our focus for this chapter.

This part is all about help and setting up support for you, your users and your team. A natural consideration is your resourcing during project-mode (and see **Step 6**); less commonly do people look at the help that you can line up ahead of time for early days and running life afterwards.

Here we point to practical things you can do to be optimally supported by:

- **Managed services** and/or **hosting providers** – or IT teams
- Your **'super-users'**
- Others in the **user community**

We include a list of essential communications tactics, which are a part of establishing these robust frameworks, and a summary reminder of the sources of ongoing advice out there for your access.

TIP

Please do not wait to read this until you're live! Many of these strategies need to be set up in advance.

It is a common project mistake to make early judgements about ongoing support styles, such as the decision to go hosted, to opt for managed payroll services or to create new in-team HR system admin roles, without a full appreciation of later impacts. Of course, you need to make these decisions early. But in those early decisions, avoid too much focus on the short-term project delivery and too little on the (more impactful!) fuller product lifespan. It is a game of unintended consequences!

Hosting and managed Services: how best to be helped and managed

During the system selection process, there are three associated considerations that compose a typical SaaS (often mistaken as synonymous with 'cloud') software purchasing: the licence model, the IT hosting and your managed service or bureau arrangement. These deal with the financing, the physical infrastructure of the technology and the support for your HR and payroll transactional processes respectively.

It is a fallacy that these three aspects of a cloud contract plan cannot be divorced and I encourage you to work with providers, using more than one if you wish to, to arrive at the right combination to suit you. Separate product from service.

When it comes to supporting your processes, the key benefits of allowing your HR transactional work to be outsourced are about focusing on your core HR strengths and allowing higher volume work to be managed with economy of scale. The more complex services – such as those involved in a fully-managed payroll service or people analytics – allow you to do without the need to resource in-house and with less risk.

There are surprising cost efficiencies with managed services too.

The reason many organisations become disillusioned with managed service plans is often about a prescription from the provider as to their precise scope (the exact tasks taken on may not be the right fit) or about poor service experiences. With the right service-provider and closer early understandings, these can be overcome.

In your business case, you will have addressed the Total Cost of Ownership ('TCO'). Now that most system licensing choices are tending to SaaS models, the balance of the equation shifts significantly from the initial cost consideration to the costs involved in ongoing maintenance and support. TCO, and consequently the project ROI, is often modelled over a three-year plan. I think that five years is the more likely lifespan for a core HCM solution in any but the most modest of contexts.

Make your decisions about the type of service based on the full expected lifespan of your product included in your business case and examining all types of cost involved in HR system ownership.

The questions of service support above impact the full contract term. Here are some hints to beef up initial system support, for which there needs to be extra consideration in early days:

- If you have set up an internal helpdesk as a point of contact for all of your users, then double the planned capacity until you are safely past first key milestones - particularly payday. This means not only extra people but more phone-lines or call queue options. Do make sure those phone numbers are very clearly displayed!
- At this stage shift the personnel you involved in the project learning and testing stages into new operational roles so that the right teams are immediately seen to be in the front-line.
- Expert back-up is a wise move, with availability of consultants. Consultants should not take early-days employee or manager queries directly, but offer-behind-the scenes support – show that your own team can handle user difficulties or problems with the live system.

Key question

How should I decide whether to go for managed service plans?

In our experience, culture within the HR leadership team is a good indicator of success with outsourced HR services – as well as reputation of service providers. It is highly dangerous to ignore any clues that either will not be receptive to working well together!

Equally, as an HR or Finance Head, you may be well-aware as to whether you carry internal over-reliance or undue cost on individuals less expert than you suspect is really necessary. This should tend you towards looking externally.

Super-user support

Super-users are key to your success both in early days and the ongoing user experience within your organisation. By the term 'super-user' we tend to mean those individuals in functional rather than managerial roles who have an extra degree of system or process knowledge in order to guide others internally, make changes and support processes.

Because super-users are so key to supporting the new system, support for those experts themselves is also vital. In early days be aware that all will wish to convey a confidence in those people as they handle early processes, results and responses. You must lead by example in doing so.

In **Step 10** a list of ideas for communication helped you aim for optimum uptake and engagement. These were discretionary and desirable ideas. By contrast, regard the list below as must-dos to have in place for your super-users. Notice that some are *for them* and others *for them to offer:*

Get right the essentials of communication that helps!

- ✓ Project highlight reports (as part of a simple project method HR can adopt) I note this here as an essential, but it remains essential when in project mode only.
- ✓ Technical configuration document set, which may include all of the following on my essentials list, although you may wish to create one or more sets of documentation if you have different super-user groups to think about.
- ✓ How you have defined and allocated user security profiles – with detailed description of system security roles.
- ✓ Bespoke user guides or 'how to' sheets – linked within system or e-format. Bespoke guides are essential because every organisation's process is different.
- ✓ Record of project and licensing documentation – sensible to consolidate in one place and not just on paper.
- ✓ The project record needs to include decisions made – whether in the format of RAID items, consultancy activity notes or a project log book.
- ✓ Documented description of how data fields are used – sometimes called a data dictionary or 'taxonomy'. *(The smallest organisation and simplest system can do without – if you read this and find it hard to fathom why then that may be true for you!)*
- ✓ Likewise documented detail on interfaces and system dependencies. Cover the technical specification and purpose of incoming and outgoing information flow.
- ✓ Change control library and template for further changes.
- ✓ Maintenance roles and responsibilities defined – data owners and notes about how each of the above items are to stay up to date.
- ✓ Information you know about from the product vendor, such as known defects (often called the 'known issues list' or 'fix list'), planned maintenance time or upcoming new release functions.
- ✓ FAQs for the support team I rate as an 'essential'. Encourage the super-user team to own the updating and sharing of a list of helpful responses to the questions users come up with the most.

Aim to build a ready-referenceable library of knowledge-sharing.

Link these support materials to a common repository, rather than relying on in-system access. Keep formats simple – in most environments it matters not if help is terribly polished, only that it is helpful! For example, employees like to watch casual videos of their colleagues explaining stuff and screen-sharing. And many find a simple PowerPoint Viewer visual easier than a text-book manual or PDF list.

Taking part in the user community

Bring out your networking skills!

Technology is no different from other walks of professional life in the value of being connected with other people. In the years in which I've worked around the UK observing how organisations interact with the world of HR technology, we notice a danger of awareness only of how the system of choice is used within that one organisation, or best-case the sector. Take part in the wider user community around you.

This community includes others in like roles in other organisations (other customers of the product or service provider), published information and the professional community of experts. Keep in touch on the topic of user experiences with other systems too. Here is a reminder of the sources of help available to you:

Where can you get help?

- Managed and hosted service providers and your named contact as account manager
- Independent and consultancy expertise (covered in detail in **Step 6**). Effective types of consultancy engagement include system review work, training and development and problem-solving
- Your colleagues: knowledge and approach of those in IT, risk and compliance, procurement, finance, web development and marketing teams each finds a relevance in the context of HR systems work
- Published material online f*rom your product vendor or service provider.* Beware of a general bad-mouthing out there on software and service experience unless you have the opportunity to examine in its detailed context…
- Which is where networking comes in. Online social networking we know to be invaluable in many ways. Because of the need to contextualise, I recommend you keep this to personal contacts in the context of advice-seeking on your HR systems.

User groups

User groups are a great way to stay in touch with relevant changes and advice. Different group styles suit those in differing roles within your team, with many suitable for super-user level but some for more senior, leader roles. User groups combine the best of specificity, personal networking, expertise and interaction. They will help you stay up to date.

TIP

It's quite straight-forward to set up your own user group. We did it! You can too. Essentially an HR system user group or network group is just a get-together you organise with that common interest. If you know how to hold a small party or chair a meeting, then you know how to do this. The trick is to keep things constructive.

Remember you can go to more than one network group if you rate this as time well-spent. Once you have found your forum(s) of choice, then attend regularly for the best value.

Step 11 in short!

Play it safe rather than sorry in early days, not least for the confidence factors all round. Remember to pay more attention in these times to your teams and your new system and that first impressions count.

You cannot set up too much support and safeguard for yourself, your team and your organisation's employees and managers. Line up your service providers and external experts, albeit keeping only your own super-users for the front-line and so receiving the applause. Establish substance to the help on offer with a comprehensive set of materials. Engage as widely as you can with the HR system user community out there, without overlooking other relevant skills in-house.

The risk factors associated with going live do not end abruptly after day one. Keep up the vigilance until safely past early milestones, gathering learning all the time. On support, we know that safe is better that sorry. In the systems world just as any other, people trump the technology.

We would like to define an end-point to your efforts. We cannot. Next time's concluding part addresses a time interval too often ignored – that of the mid-contract period and the BAU.

We will include also a run-down of the end-to-end project and some favourite tips.

Take one step on Step 11!

Take no chances and make a deliberate, personal two-part plan:

1. Set mindful check-in points with those in direct contact with end-user employees until sufficient feedback and learning period has passed such that they are happy to express a confidence that you're all now on firm ground.

   Style this as you will, but do not rely on issues being brought to your attention.

2. Be ready to take action if there are issues. Plan parameters within which you will provide extra resources (at cost) for example or take tough decisions. Support is about not faltering when it comes to the crunch.

Step 12 Back in Business – Better BAU

Our series has taken you end-to-end through how to deliver smooth success with HR technology implementation, from business case and project inception to a supported go-live and early days phases.

This final part addresses something which there is little guidance out there about: managing the mid-contract and that which is called '**BAU**' (Business As Usual).

Here we answer some neglected questions:

- What is the difference between project and BAU? What can change?
- What should you be doing mid-contract to get the best out of systems?
- How do you *know* if you're getting the best from your system?

We look at tips on keeping up your vigilance, securing sufficient resources and how to revisit the benefits of your technologies.

Finally, we will recap on the series and point you towards some key reflections.

TIP

We refer to the 'myth of mid-contract'. Think about time-frames. Typical licence terms are for three years. Many implementations extend well beyond six months in large organisations, certainly when the time taken for new roles to bed down is included. You should begin considering 'what next?' at least 12 months ahead of expiry with a revisiting of benefits and business case. Spot the squeezed middle!

What is the difference between project and BAU?

At the beginning of the guide we explained that projects achieve change; they have a defined start and end point. This is the academic difference between moving out of project and into an consistent operational running.

Academics are a pretty ineffectual currency when it comes to working with people technology! Many of the tips in this series show you that success is all about a combination of planning and method, know-how and working well with people.

In practice, after a project ends behaviours change:

- Suppliers provide services on a different basis
- Internal project team members move back to day jobs – they have less time
- End-users take systems for granted

The common thing to notice here is a shift in attention. This can impact the business with creeping costs, poor support and decaying functionality. Tricks can be missed by missing updates. Perhaps the most unfortunate outcome can simply be that intended benefits are never realised – and no-one notices.

TIP

One of our leading consultants likes to warn those he works with about a sense of loss among internal project team members once a project is formally over. Be mindful of this among your team, because they might well feel daft piping up about it.

How do you avoid the impact of mid-contract inattention?

Your four strategies are:

1 Maintain good system housekeeping

2 Secure sufficient resource for supporting the system

3 Keep in touch

4 Revisit the benefits

One role of a system administrator is to safeguard system housekeeping, keeping things tidy. This is best understood as maintaining a notional (or real) checklist of watch-points as to whether things are getting messy. Your product supplier should offer you advice (and not just about new releases) about the best practices to follow to maintain system efficiency.

There is another kind of efficiency and that is in the ongoing development. Make sure this is congruent and planned. Develop; don't tinker.

We would not rely on standard updating that product suppliers, whether in a SaaS arrangement or on premise, carry out in the natural course of system update. You need to look at your own use of the HR technology, such as your processes and your team roles too. Extra configuration or integration that you implemented in-project needs updating too. And then there is your data.

Key question

At headline level, what should you be looking out for?

Are you noticing the use of extra spreadsheets off-system? Are your functional teams describing work-arounds and manual calculations? Does there seem to be a lot of effort involved in any one process? Are you confident that management information provided is actually used? Is there out-of-date information or configuration that is not archived or erased? What are the continuing complaints and bug-bears?

Securing sufficient resource

When your organisation moves out of project, your external project team goes away from you. This may seem obvious to point out but consider the implications:

You must make a fresh contact if you need help, which means working with new names – new people to give your background to and with new views. Unlikely it's yet been paid for. Unlikely you have a guarantee of availability and lead times are often several weeks to access consultants. In **Step 11** we explained the limitations of most helpdesk support. Some service providers overcome this with excellent managed service plans and this is one way to crack that nut.

Another style-shift you'll notice from product companies is that you will be asked to form a new relationship with an account management or customer care representative (job titles of course vary) rather than a project manager. In general, these professionals are equipped to spend less time on your account and are less able to provide immediate answers. There are exceptions and some excellent practitioners and service styles.

In summary, not least if your contract involves milestone payments, your technology provider may be rather more keen to move beyond project than you are!

TIP

Although there are negatives for you as a customer in moving out of project mode, be aware that there are likely some hidden advantages. Effectively as a customer you become more 'free' of some implementation terms or practices that may not be suiting you. You may lose access to capital (as opposed to operational) funds. And don't underestimate the pressures and importance of internal politics and PR in achieving timely goals.

Assuming you now need to go it alone, you need clearly defined people to take care of maintaining the system.

Last time's focus was much about the role of a super-user. One type of super-user is a **system administrator**, or system analyst. It is a common mistake that the case for one or more salaries to cover this is over-looked and underestimated.

System administrators should cover your good housekeeping. Will they also cover user support and guidance? Are they skilled to provide the pure application support from an IT perspective? Does their role include business intelligence too? Do they have operational day jobs, such as in payroll or HR transactions, as well? These questions form the basis for your justification of a headcount.

With these functions you can:

- Outsource
- In-source (typically to an adept IT team)
- Resource within the HR operational team

Key questions

How big do you need to be to employ an HR System Administrator or Analyst? How many FTE do you need in these roles in relation to your organisational size and employee numbers?

This is a question that independent consultants are often asked because managers do struggle to make their case. One tip is to make sure you do so as part of considering the Total Cost of Ownership and in your business case – get it covered as part of the up-front internal deal!

We feel comfortable offering a clue that it is above about 1,000 employees that typically there is a sure need for someone dedicated. But a more important factor when it comes to pure application, as opposed to user, support is the breadth of business functions that you are using the system for. For example, if you are live with a fully integrated product suite and self-serviced by end-users then you have a much heftier requirement than for supporting a system just used within the HR team for core HR and payroll.

Whilst there does tend to be an approximate direct correlation between employee numbers and system team FTE, I challenge you if you are not seeking to make economies on scale.

One of the most significant factors to consider about being sure of adequate resource is that of business continuity. A problem with system administration roles is that – particularly in mid-sized organisations – they can become a single point of failure. And of flight risk.

Never accept a situation where you are aware you are dependent on one person's uncaptured knowledge. Safeguard this with documentation, on-boarding for super-users, aiming for the fullest of automation and keeping a wider network.

In this guide, we have already looked closely about how to make the most of being part of a user community and keeping in touch.

This leaves your fourth strategy to avoid the impact of inattention in the BAU:

Revisiting the benefits

Ideally at project inception, prior even to initiation, there is an exercise performed in an analytical way to identify the benefits of potential HR technology. (**Step 1** covers getting started in this way with advice on business case, including examples of the benefits referred to below.)

A firm piece of advice for mid-contract is to review whether or not those benefits have been achieved.

You should identify milestone intervals with which you wish to do this. We recommend a first review in the first six months of post-project use and at least one more before you begin to consider licence renewals or another tender and selection process. This assessment is often called '**benefits realisation**'.

How do you go about assessing whether benefits have been achieved?

Assuming that you do not have the model baseline analysis simply to return to and tick-off, then likely you are in a position of needing to assess how well your HR system is working for you from scratch. There are templates out there for benefits realisation analysis. Try this straight-forward approach:

1. Identify benefits that you can quantify (cashable/financial)
2. Translate each of these into the same currency (money!). [Many people stop at this stage but you should move on] but
3. Add benefits you cannot quantify. Things that cannot be measured may be less easy to manage but they do not disappear!
4. You most likely will wish to categorise these benefits (for example: by module or business unit)
5. Spread these across the lifespan (to-date and anticipated) of the HR system
6. Total the benefits achieved per period. Some will remain as qualitative comment and you could always apply a H/M/L sense-check on their importance

Key question

Why bother with revisiting the benefits?

Analysing methodically whether your HR system is working for you gives you evidence you need to take corrective action. Success makes for a great PR story. If by contrast you find you were over-optimistic in the beginning and outcomes have not been so great, then taking stock and examining the evidence allows you to intervene.

Intervene by, for example, putting together a plan for next development work or changing models for supporting resource. Find the system waste that is caused by poor housekeeping. Raise new business questions about the scope that you aim for. Ask amongst the user community about your options.

We use an analogy which may be useful to you about benefits realisation:

"Looking at the weather forecast does not bring on the rain!"

Do not be an ostrich.

7 Offset against costs. Consider the full system TCO

8 Compare this return, both as a sum of return and at item level, to your expectations. If you did not baseline your intended returns, then apply your nous about whether stuff is good enough!

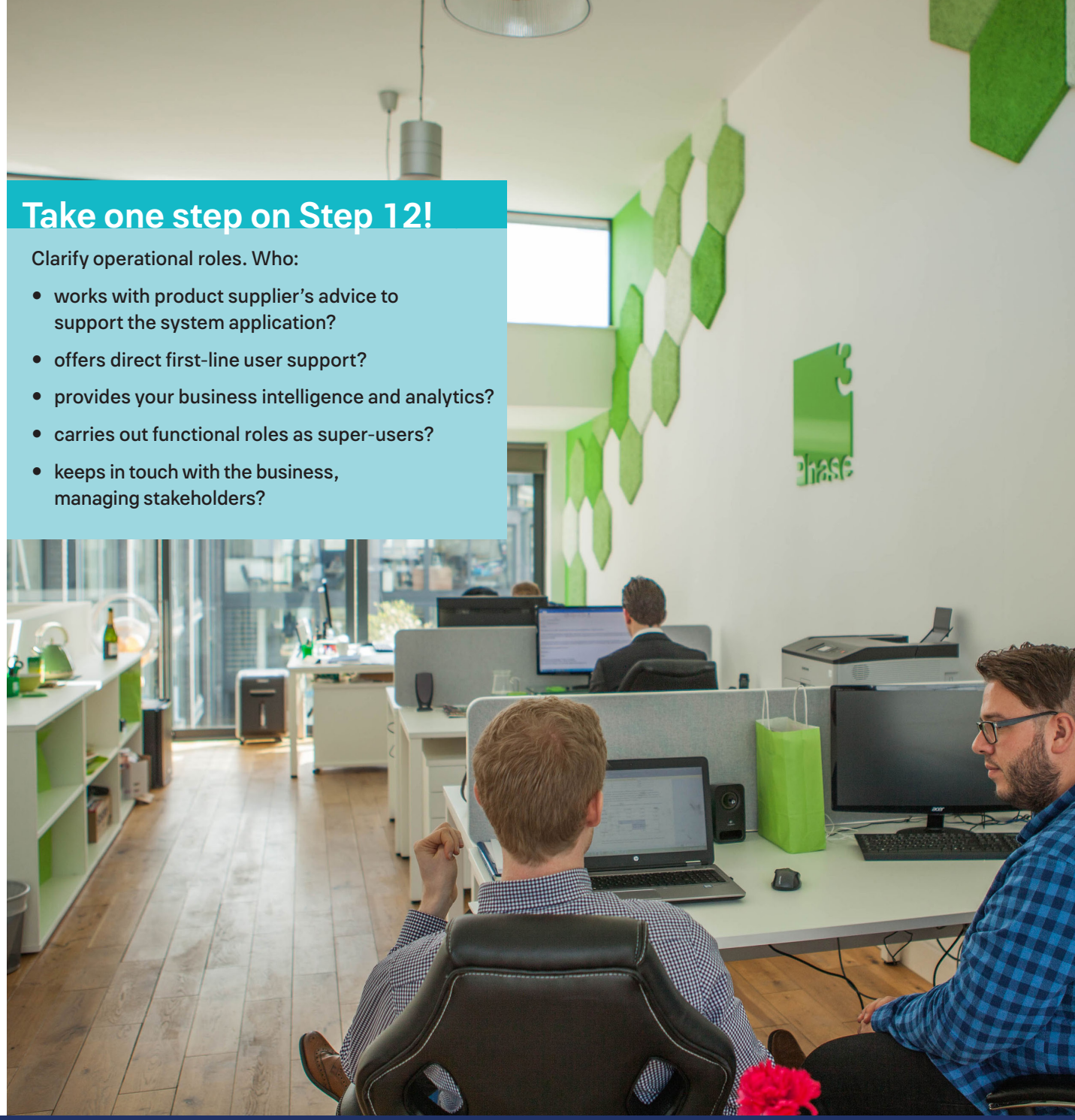
9 Conduct an associated re-assessment of outstanding risk. Do not congratulate yourself for past risks that did not materialise, because these what-if scenarios do not affect the ongoing position

Step 12 in short!

Whilst there is a real difference between project-mode and BAU, this can lead to a dangerous 'myth of mid contract', which assumes that all can afford much less attention to your HR technologies.

There are sensible ways in which you can maintain a vigilance to optimum performance, including practices of good housekeeping, appropriate resourcing and playing an active part in the user community. Carry out planned re-assessment of benefits and keep an eye on the licence and contract timeline.

It can be difficult to acknowledge project disappointments but to do so gives the opportunity and impetus to improve and develop. And if success is 100% then enjoy an enormously positive story-telling.



Take one step on Step 12!

Clarify operational roles. Who:

- works with product supplier's advice to support the system application?
- offers direct first-line user support?
- provides your business intelligence and analytics?
- carries out functional roles as super-users?
- keeps in touch with the business, managing stakeholders?

Phase 3

people behind people technology

Further Support and Information

Phase 3 are delighted to provide support to clients who are at the beginning or end stages of system implementation projects. Our website has a wide range of downloadable resources to help you along the journey and our team are on hand to talk through where you are in the project and how to excel!

www.phase3.co.uk

About Phase 3

Phase 3 are leading providers of People Technology Consulting and Services. We ensure clients get the maximum value out of the HR and Payroll systems, projects and services.

We provide high calibre and independent selection, implementation and project management consultancy, support clients through flexible and secure managed payroll, system administration and data services and are providers of insights, resources and tools for people technology specialists.

For further information about HR and Payroll projects, please get in touch for a scoping conversation.

About the Author

Kate Wadia was the Managing Director of Phase 3 Consulting, independent specialists in people technology in the UK. Her passion at work was bridging the gap between technology and people at work, translating for HR professionals the language of HR systems and making meaningful their potential. She believed that success with people technology is through people and that people are the differentiator.

Using simple techniques drawn from HR experience, project management, business psychology and analogy with everyday life, Kate explains how to work well with technology and technology projects in an HR leadership role. With a background in contrasting private and public sector HR management, Kate developed her thinking in seeking for herself to understand her first HR systems project-work. Kate's guiding principle was that openness offers knowledge-sharing, credibility and trust, best delivered with incorrigible enthusiasm.

Sadly Kate passed away in March 2019. Kate's morality, intelligence, dynamism and kindness remain ever-present in the hearts and minds of all who knew her.