# IMPLEMENTATION: COMMON PITFALLS & CONSIDERATIONS

**Common pitfalls & considerations for each stage of the implementation project cycle...**

# AS SPECIALISTS IN HR AND PAYROLL SYSTEM IMPLEMENTATION, THERE AREN'T MANY SCENARIOS WE HAVEN'T COME ACROSS.
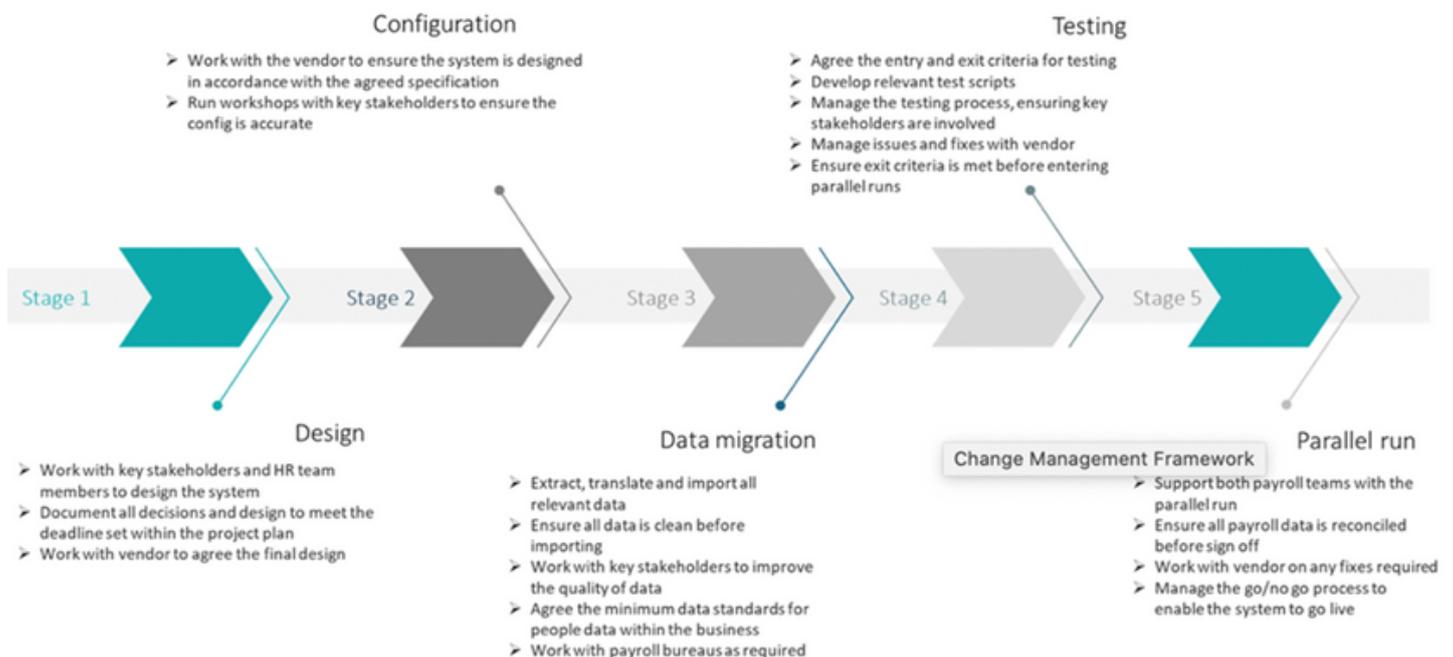
In this short guide, we share some of the most common pitfalls and considerations to be made during each stage of an HRIS or payroll system implementation.

We'll flag up all of those issues you may not have anticipated as well as share our insights and experiences based on real client projects and lessons learned.

## STAGES OF THE IMPLEMENTATION PROJECT...

All implementation projects, whether HR or payroll (or both) follow a number of distinct 'stages', and rightly so. Structure is really important when it comes to system implementation as it allows for in depth planning and forward thinking.

Typically, project stages comprise the below:

**Configuration**
- Work with the vendor to ensure the system is designed in accordance with the agreed specification
- Run workshops with key stakeholders to ensure the config is accurate

**Testing**
- Agree the entry and exit criteria for testing
- Develop relevant test scripts
- Manage the testing process, ensuring key stakeholders are involved
- Manage issues and fixes with vendor
- Ensure exit criteria is met before entering parallel runs

Stage 1    Stage 2    Stage 3    Stage 4    Stage 5

**Design**
- Work with key stakeholders and HR team members to design the system
- Document all decisions and design to meet the deadline set within the project plan
- Work with vendor to agree the final design

**Data migration**
- Extract, translate and import all relevant data
- Ensure all data is clean before importing
- Work with key stakeholders to improve the quality of data
- Agree the minimum data standards for people data within the business
- Work with payroll bureaus as required

**Change Management Framework**

**Parallel run**
- Support both payroll teams with the parallel run
- Ensure all payroll data is reconciled before sign off
- Work with vendor on any fixes required
- Manage the go/no go process to enable the system to go live

# PROJECT READINESS

Before you get stuck in to the planning and design stage, you'll need to do some thinking - particularly in relation to available resources!

One of the most common misconceptions we see is in relation to the level of resource the client needs to put towards a project to complement the vendor team.

There will ALWAYS be more requirements and more resource required than anticipated or expected from the outset, compared to that offered by the vendor.

Typically 'client effort' is at least 1.5 times that of the vendor and peaks during testing and pay parallel stages

## SUPPLIER VS CLIENT SIDE RESOURCE

- Vendor side is 'half the story'
- For every high level step provided by the vendor there will be several subtasks
- Do you have the internal skills to deliver the project?
- Do you need to bring in external support?
- Consider impact of BAU on internal resource
- Set expectations during business case build
- Be mindful of damaging vendor relationship due to underestimating the resource required

# PLANNING & DESIGN

When planning - remember to work with the solution you have purchased. There is a reason you have chosen your solution - because it is going to move you forward.

Map your current as-is process and your to-be processes with that in mind!

# CONFIGURATION

## CLARITY AND SIMPLICITY

Organisation and clear communication is key - there is no room for ambiguity here.

Remember, your requirements are fundamental to the design of the system and without clarity, you risk missing the mark when it comes to configuration and ending up with a system that isn't fit for purpose.

Consider widely what you want and build in improvements to current processes then, ensure that specifications have been reviewed by ALL stakeholders. It's vital that all of the 'what ifs' and consequences have been considered.

## DON'T RECREATE THE SAME

Don't try and reinvent the wheel. Work with the solution you have chosen for your core processes.

## CONSTANTLY VERIFY SPECIFICATIONS WITH YOUR STAKEHOLDERS

Include regular reviews and check-ins with all of your stakeholders to ensure that you continue to stay on track and that specifications have not changed over time.

Often, it's easy to get wrapped up in BAU and forget to communicate between teams when situations change - so having a system in place to constantly verify specifications all round is key.

## HAVE YOU GOT ANY 3RD PARTY INTEGRATIONS COVERED?

Don't forget third party integrations. Have you spoken to key stakeholders and gathered requirements in relation to integrated software and required functionality?

# INTEGRATION

Integration is the ability of your HR database to link to other business systems, such as Finance, Learning Management Systems, Applicant Tracking Systems, Performance Management systems and more.

You may be implementing an 'integrated HRIS' or stand alone 'best of breed' system:

**Integrated HRIS**
This typically refers to software that allows Payroll, HR and Time & Attendance and possibly more functions to pass data between them without any re-keying of data or need for imports/exports.

This is often also described as a  'unified' HRIS solution, utilising an end-to-end suite designed to manage the entire life cycle of an employee within one integrated system.

**Best of Breed**
A suite of independent software solutions that specialise in a niche area of expertise. Usually the software is bound together by integrations, so that end users are able to utilise the best solution for the task, but with seamless data flow across the HR function.

When it comes to implementation, if your system falls into the latter category, it's even more essential that integration is not 'forgotten' or left until the last minute.

Ensure that stakeholders representing those other business functions, such as IT  or accounting, are engaged **early on** in the planning stages.

As well as those internal stakeholders, you also need to consider any external stakeholders who need to be involved in the process and allow time for discussions. For example, IT may also need to liaise with their own software vendors.

# DATA MIGRATION

How well you approach your data migration can make or break a project and it's NEVER too early to start planning for this stage of the project - even if you haven't even chosen a vendor yet.

## Things to consider:

- Where is your data currently held?
- Is people data held in separate HR and payroll systems ?
- Where is the 'source of truth'?
- How easily accessible is your data?
- Is it portable?
- Has your data been sufficiently cleansed?
- What data don't you need?

Your data needs to serve a purpose - before commencing a project, consider what data you need to take with you. Only take what you need and ensure that whatever you bring you will be able to transfer into something meaningful.

Failing to address and correct your data early on can prove a big risk and significantly hinder a project. Your data informs all reporting, with the reputation of HR often hinging on getting that data accurate.

### Remember: Your data is NOT your vendor's responsibility!

## Extract, Transform, and Load...

The process of ETL plays a key role in data integration strategies and involves gathering data from multiple sources and consolidating it into a single, centralised location.

# TESTING

One common misconception we come across during implementation is that the vendor is responsible for UAT. Whilst of course they will have a large part to play, it is in YOUR interests to invest as much time as possible in the testing period.

Testing should not be confined simply to those involved in the implementation or individual department heads/managers, but should also include end users.

This is important for a number of reasons: it will build interest in the project / solution, it will ensure everyone has the opportunity to contribute their feedback, and it enables users to become all important 'advocates' for the system.

The purpose of testing is to determine whether or not what you have configured is 'correct' going forward, and that all stakeholders are getting what they need.

It's not simply about data accuracy, but should consider UX, workflows and whether you are ultimately able to sign off on what you want delivered.

Your vendor will be able to supply a number of standard test scripts for this purpose, however it's important to remember that these will be minimal and fairly generic.

You will need to plan time to test what YOU want to test within the system - anything specific, non-standard or unique to your organisation.

## Key takeaways

- ■ Testing should be PLANNED and methodical
- ■ Include your key stakeholders in the testing process
- ■ Track & Trace - Issue logs are king!
- ■ Remember you might need to repeat tests when you come across issues
- ■ The vendor is not responsible for creating your test scripts

# PARALLEL RUNNING

A **parallel run** is the practice of keeping an old system operational for a certain time period once a new system is launched in order to ensure the new system behaves how it should. Once you are confident it does, you can 'switch it off'.

Parallel running is very much a collaboration that needs to be well planned between your people function and payroll. In order to parallel run, it's essential that information is shared in a timely manner.

This stage of an implementation project can be an incredibly stressful time for payroll resources who need to continue paying people whilst at the same time ensure that the correct processes are being created for the future system.

**When to plan your parallel run?**

Typically you will do 2 to 3 parallel runs and whilst, historically, organisations would have been advised to avoid March end of year, this period is not as much of a red flag as it once was due to advances in RTI.

You will need to plan your parallel runs around events such as salary reviews for example. Consider your pay periods also.

Defining what 'success' looks like for parallel running is absolutely critical in order for decisions on go/no go to be made quickly and in consideration of pay deadlines.

## Key takeaways

- ■ Align resources - get your HR team ready for double-keying (legacy and new system)
- ■ Accurate Reconciliation - Penny test is key
- ■ There are no shortcuts!
- ■ This will dictate your Go Live / No Go Live Decision
- ■ Parallel running is the part of the project that can get the noisiest if not done right!

# SYSTEM ADOPTION

Even before you have gone live with your new solution, consider how you are going to ensure adoption throughout the organisation - after all, adoption is paramount to its success.

It's said that the hard work begins from the moment you go live! Again, defining what the solution needs to deliver you from the outset is key, in order for you to communicate the success of your new system to senior leadership and end users.

Design clear communications in order to let employees know that:

a) change is coming and
b) change is good!

Employee engagement will be much improved if and when they can see the value in a new system, so HR and internal comms teams must work together to ensure clear and consistent messaging before, during and after the transition.

Include regular review periods post go-live, for example 3 months in,  and measure adoption usage, stats and improvements in efficiency.

Onboarding is a continuous journey and requires a mindset of continuous improvement.

You'll also need to apply the same onboarding principles when it comes to updates and new functionality, to ensure you and your workforce continue to maximise the benefits of the new system.

# DOS & DON'TS!

Implementation can be fraught with pitfalls - both anticipated and unanticipated!

Embarking on a project with your eyes wide open and with a clear, structured yet flexible plan in place however will set you on the right course to success - whatever that looks like to your organisation.

Keep in mind some of these simple dos and don'ts before your begin...

| DO | DON'T |
|---|---|
| Consider the impact and scale of the project | Terminate your existing supplier too early |
| Prepare for 6-9 months of full time involvement | Damage supplier relationship through ambiguity |
| Manage Board expectations | Under resource |
| Phase sensibly | Over promise |
| Build on and maintain supplier relationship | Live by your project plan - build in flexibility |
| Involve ALL your stakeholders and keep them in the loop throughout | Underestimate ETL (Extract-Test-Load) effort |
| Plan a launch programme | Forget to Track & Trace! |

# WHY CHOOSE SILVER CLOUD TO MANAGE YOUR IMPLEMENTATION ?

**Ensure your implementation goes smoothly, to time and to budget by trusting Silver Cloud to help manage your system implementation.**

Our expert consultants and project managers will enable you to:

- Free up your internal resources for BAU

- Get the most out of your HRIS from day one

- Reduce your risk of poor or delayed implementation

- Manage the 'high risk' elements (ETL, UAT, Parallel Running)

- Navigate the pitfalls and question accordingly

- Quickly identify and resolve issues

- Ensure a smooth go live and onboarding transition

- Measure early engagement and success

**By partnering with Silver Cloud you will also benefit from:**

- No recruitment fees or onboarding costs

- Transparent, hourly fees: only pay for what you use

- Backing of a 20+ strong team of HR/payroll experts

# ABOUT SILVER CLOUD

As a whole-of-market HR and payroll technology consultancy, Silver Cloud specialises in helping organisations of all sizes select and implement the right HR and payroll software.

In addition to selection, implementation and project management services, Silver Cloud also offers a cost-effective managed service for both HR and payroll.

Get in touch for a friendly, no-obligation chat about your selection and implementation options - we'll do our best to help steer you in the right direction!

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