

HR Software Transformation: A Complete Step-by-Step Guide for a Successful Transition



Journey to HR success

Introduction

How to Transition to New HR Software in 8 Simple Steps



The roles and responsibilities of HR are no longer a functional part of any organisation that simply recruits and maintains a workforce. Companies are expecting their HR departments to deliver more value than ever before—often with conflicting priorities, such as complying with HR legislation or finalising payrolls with the same amount of resources.

Outdated processes and traditional administrative methods, for example, paper-based timesheets and leave request forms are not only time-consuming, they also lack access to other integrations.

Surprisingly, small and mid-size businesses achieve the most success with implementing new technology. If you're thinking of investing in an HR transformation software solution for your business, however small or large, and wondering how to transition, you're in the right place.

Integrating a HR software solution can streamline all your HR processes—allowing you to put the focus back on attracting the best talent to your business. That's why the HR technology market is expected to increase in revenue to almost £6 billion in 2023.

This step-by-step guide will help you make the change from traditional operations to a streamlined HR software solution.

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- What is HR management software?
- Why do you need a HR transformation solution?
- The 8-stage process for a successful transition
- Why choose Appogee HR?
- Take control of your HR transformation

WHAT IS HR MANAGEMENT SOFTWARE?



A great HR transformation tool can improve the operational performance of your whole business. As well as managing your business's most valuable asset, the workforce, a software solution that is fit for purpose across all HR functions will also:

- **Improve business efficiency.** Improving operational efficiency is the top benefit of choosing a digital solution. Features such as time tracking will show the full visibility of employees, regardless of work location-allowing you to report on staff working hours with ease.
- **Coordinate with your business specifications.** HR management software that is customizable should be designed around existing company values, policies, and procedures. For example, sick leave or long service policies.
- **Automate a wide range of HR functions.** Repetitive tasks such as absence management, recruitment, payroll, and compliance management processes can be automated—reducing time and eliminating human error.
- **Organise employee information.** Cloud-based HR systems allow you to access up-to-date personnel data, such as employee profile, payroll, or absence regardless of work location.
- **Integrate with existing platforms.** Keep your systems connected by maximizing productivity, security, and data consistency. Reduce duplication and comply with data protection legislation, such as GDPR.

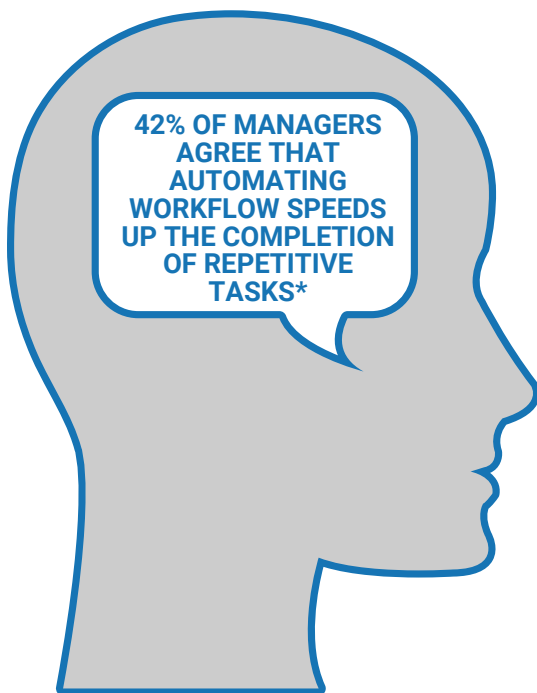
HR management software offers you comprehensive analytics. Have accurate information at the touch of a button and plan workforce strategies, develop innovations, secure remote working activities, and keep employee data confidential.

WHY DO YOU NEED A HR TRANSFORMATION SOLUTION?



HR is now recognised as a collaborative partner in creating and achieving business goals alongside managing all other HR functions. Comparing the instant benefits against the long-term success of investing in HR technology makes good business sense.

HR managers who work out the rate of investment (ROI) for HR management solutions help keep their business not only running but stay competitive. That's why 88% of SMBs say automating tasks allows them to stay competitive and compete with larger companies, making faster decisions and closing leads quickly.



MAKE DECISIONS BASED ON FACTS, AND NOT BY INTUITION OR BIAS.

The different types of annual allowances you might need

HR software offers analytical tools to base strategic decisions upon.

Have access to comprehensive reporting tools at your fingertips by monitoring employee performance or costs per department.

According to a McKinsey study, 31% of organisations have already fully automated at least one function.

WHY DO YOU NEED A HR TRANSFORMATION SOLUTION?



Get instant visibility with remote, hybrid, and office-based employees—allowing you to manage workforce capacity with one simple interface.

HR software is safe and secure. Cloud-based solutions protect customer data with robust security measures, user-defined access controls, threat detection, multiple encryption layers, and more.

A first-class HR transformation solution, such as **Appogee HR** grows alongside your business— helping HR departments across the globe make solid data-driven decisions and reduce repetitive tasks.

Matt Roche, Management Accountant at Yappy

“I’m yet to find something Appogee Leave can’t do. What’s more, the system is ever evolving too.

It’s extremely user-friendly and aesthetically pleasing. Given that Leave and Sickness are not the most exciting of functions, it’s doing what it can!”

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



Let's look at how you can implement a new HR solution for your business with our step-by-step guide.

1. Launch HR transformation with a strategic approach

No successful transformation is complete without a strategic plan. Your plan will show how you intend to meet your long-term vision—including aims, objectives, and specific actions to achieve your goal.

Put simply, a strategic plan is your HR transformation roadmap. It should answer key questions, such as where you are now, what you want to achieve and how you will get there.

Aside from the fact that **engaged employees are 87% less likely to leave their organisation**, a strategic approach should start by focusing on people, skills, and development as much as the technology itself.

Develop your strategic plan by identifying who is responsible for what, who your key stakeholders are, your timeline for key milestones, budget expectations, and how you will measure the success of the transformation.

Build trust from early on and maintain great relationships by involving people from the start. Get buy-in from stakeholders to minimise disruption and maximise excitement about the change. Share your initial ideas with employees, HR advisors, payroll officers, IT colleagues, trustees, or board members. Allow everyone to contribute their views and the problems that affect them with current systems.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



Listen well—it'll help you look for the best solution and understand challenges you weren't aware of or hadn't thought of. Highlight how the HR transformation will benefit the company and everybody in it.

Here are some useful questions to help you create a strategic plan for your organisation:

1. Where are the gaps in our current HR processes?
2. Which particular areas do I need to improve efficiency?
3. What problems do employees face with our existing system?
4. What other platforms do we use and which software integrations are needed?
5. What are the main features that a new system would need to have?
6. What is the budget and timeline for implementation?
7. How will we manage staff training and the development of new technology?

The answers will help you **create a transition timeline** and inform the questions you ask HR providers when looking at specific solutions.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



The global HR technology market is huge. And it's expected to become even bigger by becoming a £31m industry by 2027. With such a growing HR market, how do you navigate between the many software providers available and choose the right solution for your business?

2. Do your research and evaluate the options available to you

Given the fact that HR transformation tools offer a diverse range of key features, start by identifying what you want the new HR system to do for you.

If managing employee absence is a priority, a solution like Appogee Leave will track, monitor, and report on all types of employee leave, including annual leave, sickness, working from home, and much more. It's fully customisable with key features such as a holiday planner, employee directory, team bios, carryover automation, and more. Get rid of spreadsheets and other manual records, such as employee information and annual leave records by having one go-to system for all your HR record requirements.

However, if you're looking to transform all your core HR operations, then choosing a solution like Appogee Essentials is perfect. Maintain employee information, records, and company documents in a centralised, secure, and accessible cloud-based location.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



Appogee Essentials includes all of the Appogee Leave features as well as document management, employee profiles and records, time and attendance tracking, and more.



Listen to the social proof of others who been through it

M-KOPA

“The best part of the system is the leave management software”, says Anne Mwicigi, HR Shared Services Manager at M-KOPA. “ It allows employees to simply submit their requests, while HR can have oversight on all the allowances. Appogee HR Essentials will calculate everything for us and has significantly reduced the HR team workload”.

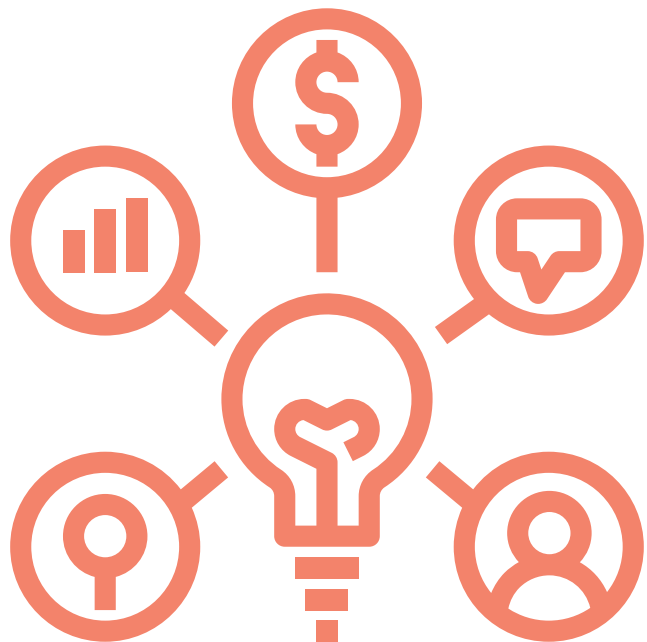
THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



Advanced HR solutions like **Appogee HR Success** can offer your business all the tools it needs to streamline functions and become more efficient. From pre-boarding to off-boarding and everything in between Appogee HR Success includes all the functions of Appogee Leave and Appogee HR Essentials including an onboarding portal, advanced performance management tools, and templates, business goal management solutions, and more.

Flora Oram, former Head of People & Culture at Computeam

“We’ve only recently implemented this section of the platform, but already we have much better staff engagement through a thorough performance management structure. Running reviews is so easy for managers, so they no longer dread doing one to one’s!”



THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



If tracking project or employee time is a priority for your business, then a time-tracking solution from Appogee HR is perfect. Given the fact that employees have multiple tasks at any one time, multi-tasking without time-tracking decreases productivity by 45%. Specialised software, such as **Appogee Time Tracker** will allow you to see where employee time is being spent.

Keep project tracking accurate and productive with project planning and budgeting tools. Create projects or individual tasks and track timings easily, either in real-time or after completion. “We had no ability to measure the profitability of projects, it wasn’t scalable at all and it also wasn’t used across the business, as we all had separate processes,” said Dave Fenton, Vice President of Services at Ancoris.

Time-tracking software from Appogee HR helped Dave and his team make better business decisions with each project:

“We can see the facts of each project and then help our customers make good commercial decisions regarding how to get the best use of our efforts. We know who’s working with customers and provide them with evidence and fact-based discussions. This was actually recently instrumental in helping us get a significant renewal from a customer. We wouldn’t get this detail if we were still using spreadsheets.”

As you can see, there are so many HR and productivity options out there. It can be mind-boggling to work out the right solution for your business. Trialing a few of your favourite providers with your team will allow you to test out a product before making a purchase—giving you the confidence that whatever solution you choose, it aligns perfectly with your needs and expectations.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



3. Get a demo

You've done your research, and shortlisted a few human resources information systems (HRIS). You now have a few different options to choose from and are not in a position to make a final decision.

Schedule a demo with each provider to support your thinking—allowing you to make sure you're investing time and money in the right solution for your business.

Not only that but arranging a demo will give you the unique opportunity to check whether the HR technology has all the unique features and capabilities you need. A demo will allow you to share your pain points and ask questions relevant to your organisation—whilst making sure you're not paying for features you wouldn't use.

Capture the pros and cons of each solution. Work out how each software solution compares with others, for example, pricing, features, and ongoing support.

Once you have decided on one or two providers, request a more in-depth demonstration of its full features. Feel confident that you're making the right choice for your HR operations by tailoring the demo to your needs. If your goal is to improve onboarding processes, for example, spend more time understanding what the candidate experience looks like, whether there are any restraints, and what the whole process looks like.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



4. Explore integrations

Over five days per week are lost each week in the UK due to duplicate tasks. It's no wonder there's a high price tag on making sure your software solution integrates seamlessly with other platforms.

HR technology should allow you to automate standard workflow and reduce the need for manual tasks—eliminating the need for repetitive data entry.

Appogee HR Success, for example, integrates perfectly with Google Workspace, Greenhouse, Teamtailor, and many other platforms, letting you access the all benefits of productivity and applicant tracking systems without disruption.

OVER FOUR
DAYS PER
MONTH ARE
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DUPLICATE
TASKS.*



THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



Connecting data and workflows together can save you up to three hours a day. Streamline your HR operations with integrations that allow you to:

- **Set up checklists.** Standardise existing processes from Google Docs by creating checklists for new hires and leavers, performance reviews, or staff training.
- **Run recurring processes.** Auto-assign and complete repetitive tasks, regardless of employee work location alongside Office 365 Xero.
- **Eliminate spreadsheets.** Integrate with Google Sheets for tracking employee data and get rid of paper-based systems.
- **Sync calendars and email apps.** Keep in touch with candidates and teams from one simple dashboard. Reduce administrative costs associated with candidate scheduling, reference requests, sending job offer letters, and more with Google integrations.

Take it from Mervyn Da Silva of Singletrack who said:

“As the Operations Manager of a small company, my responsibilities cover a large number of areas, having a system like Appogee HR Essentials in place means I’m definitely saving valuable time on HR admin. I can also configure what I need to my own requirements, managing the full HR process for all staff.”

Check each HR software solution can integrate with existing platforms. Keep your systems connected to maximise productivity, security, and data consistency.

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



5. Migrate data and test

Once you've chosen your HRIS, the next stage is to migrate data and run test procedures. Work with your HR software provider to identify the steps required for data migration. Find the right time to make the transition by setting a realistic timescale with your team.

Migration takes place using three steps; the test stage, side-by-side run, and go-live.

Let's take a look at the first two stages:

1. Test stage: Before any testing is done, it's worthwhile doing a complete data cleanse. Look for incomplete employee information or incorrect data about teams or individuals. Test that all data is accurate in your new system by completing a series of tests, such as comparing payroll data or information about employee contracts
2. Side-by-side run: Simulated migrations allow testing your data migration before the final upload for the go-live stage. Uncover any issues about compatibility or other common problems, for example, incompatible usage of abbreviations (eg PT or part-time).

Testing out your new HR solution is an ideal opportunity to start training staff on how to operate the features successfully. Not only that, training employees on how to use new software will identify any skills gaps—key to successful automation implementation. (More on staff training next).

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



6. Embrace new technology

The success of implementing any new technology boils down to how employees adapt to change and how well it's managed. Given the fact that 33% of business leaders failed to achieve the intended results from past developments, getting it right is key to successful transformation.

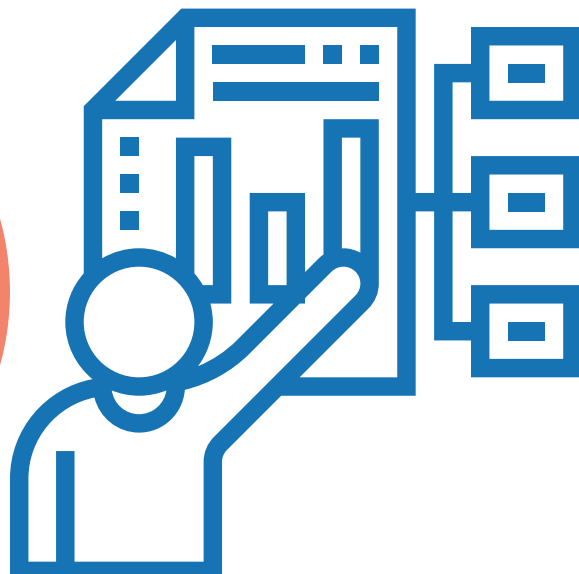
Organisational change is more effective when leaders communicate a vision consistently. Reports show that just 20% of employees see technology changes positively when they haven't been consulted.

Build confidence in your new HR software solution with regular team and stakeholder communications. Encourage communication that focuses on open and honest discussions. Reinforce the fact that employees can influence decisions and that their feedback is taken seriously.

DID YOU KNOW?

ONLY 20% OF
EMPLOYEES

SEE TECHNOLOGY
CHANGES
POSITIVELY WHEN
THEY HAVEN'T BEEN
CONSULTED.*



THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



That said, companies are more than five times more likely to have successful transformation when leaders have role-modeled the behavior changes they were asking their employees to make. Role model by staying positive, even at times when the adoption of new technology hasn't gone to plan, or by simply acknowledging how changing to new situations can be challenging.

Provide high-quality user-specific training. Work closely with your HR software provider to plan and deliver training to employees.

According to research from IBM, an increase in skill levels leads to a 10% increase in productivity when teams are well-trained. Revisit the pain points and focus on the new benefits your business will see as a result of the transition. Help employees feel inspired and excited about using new HR technology—it'll make the transition a little easier for everyone involved.

"The employee engagement features within Appogee Success} have given both our employees and managers a specific place to speak their truth and have everything organized in one spot. It has truly fostered a culture of learning and of growth because it allows everyone involved a safe space to vocalize their opinions and thoughts. It also has enabled opportunities to push employees forward in areas where they might have shortcomings".

—Britt Chavers, Office and Human Resources Manager at ASE Direct

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



7. Go live!

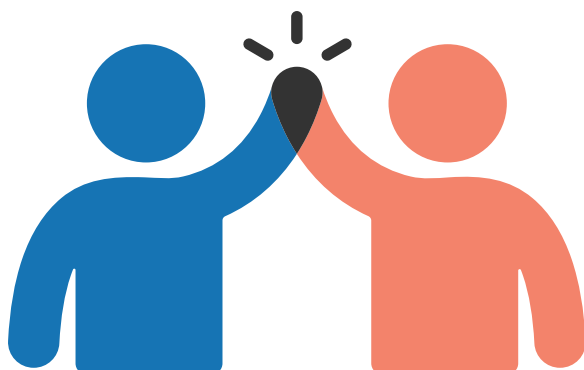
You've done all the research, chosen your HRIS provider, migrated data, made the necessary system changes, and trained your team—next up is the exciting part!

Congratulations - it's time to go live and roll out!

Communicate your go-live day with everyone involved. Make sure teams are well prepared beforehand. If possible, reduce some of their usual daily tasks so they have more time to get to grips with the new software.

Observe and listen to employee feedback. You may find that usage is lower than expected. Find out why by speaking with teams about their workstreams and how the technology has changed how they work. Additional training may be needed on a particular aspect or an improvement in internal communications.

Organise lunch and learn sessions during the implementation phase. Give employees the space they need to ask questions, learn from each other and raise any concerns.



*Only 50% of staff and 64% of managers are satisfied with the resources they have at their disposal to learn how to use new technology

THE 8-STAGE PROCESS FOR A SUCCESSFUL TRANSITION



8. Monitor and evaluate the impact

The final stage of the transition process is to monitor how your new HR software is meeting the needs of your organisation.

Revisit your operational plan and review the intended goals you set. Do you have improved efficiency in the areas you identified? Have you overcome the HR problems that employees identified? Do the main features you wanted fully meet your needs?

Monitor and evaluate progress by:

- Tracking and improving system usage by running reports
- Speaking with staff, key stakeholders, and others involved in the process to get feedback and ideas for improvements
- Setting up a user group to support colleagues
- Organising regular check-ins with different user groups
- Running regular surveys to find out what is working well (or not)

Work alongside your HR transformation provider to iron out any difficulties and get ongoing support.

Above all, your HR transformation process will continue to evolve. It's certainly not a stand-alone process that ends when it's implemented. A successful transformation relies on listening to feedback, continuous monitoring, and the ability to change where needed.

"The assistance we have had from Appogee HR throughout the trial and since we've been a customer is second to none - the team is on hand to answer any queries and the support centre is really easy to use".

–Vicky Madigan, HR & Business Coordinator, SEM Energy"

WHY CHOOSE APPOGEE HR?



Appogee HR can provide a complete HR solution for your business. We're small enough to give customers a first-class service but big enough to deliver a comprehensive range of HR operations.

Let Appogee HR provide the people software you need right now and one that can grow alongside your business with:

appogeeleave A best-in-class online absence management software that makes it easy to track and report on all types of staff leave, including annual leave, sickness, working from home, and much more.

appogeehr essentials

Manage core HR operations with software built from the ground up to meet all of your HR needs. Keep employee information, records, and company documents in a centralised, secure, and accessible cloud-based location.

appogeehr success

An advanced HR solution for your business. With everything included in HR Essentials and Leave, HR Success is our most comprehensive HR package. From a fully customizable onboarding portal to advanced performance management to employee recognition, Appogee HR Success delivers powerful results for your business. (And with our Appogee HR success package, have access to a full annual service review!)

Both of our Appogee HR solutions also include Appogee Leave.

WHY CHOOSE APPOGEE HR?



appogee**time** tracker

Intelligent project tracking for forward-thinking companies. Easy to use, secure software for tracking time against customers, projects, and teams with customisable metrics, planning & budgeting, and much more.

As well as having a complete range of HR solutions, Appogee HR offers an excellent customer support package with a range of options for ongoing advice and support. Contact us by email or phone, and access our support pages, or our dedicated YouTube channel when you need us.

Never feel alone in transforming your HR functions. We'll guide you every step of the way with assisted setup and personalised video calls. Just purchase this option at the beginning of your license period.

DID YOU KNOW?

As we're trusted by a global customer base of over 800 businesses spanning 50 countries, we're confident that we can partner with your business to meet your HR and productivity requirements.



TAKE CONTROL OF YOUR HR TRANSFORMATION TODAY



Technology is the foundation of all businesses. HR automation solutions simplify routine and repetitive tasks—providing a great user experience and allowing employees to concentrate their efforts on other business priorities.

Whatever the size of your business, Appogee HR can offer you the flexibility to choose the right solution for your business.

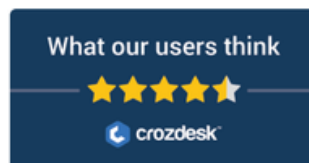
Get started today and journey to HR success

Please visit www.appogeehr.com/demo-request-form and one of our friendly representatives can walk you through a personalised demo of your chosen solution in action.

Alternatively, why not try our HR solutions yourself for free for 14 days, please visit www.appogeehr.com/trial.

If you're not sure where to start, please give us a call on **+44(0)345 262 3003** and we'll help you work out which solution is right for you.

Our service and support is highly rated!



FIND OUT MORE

If you're interested in finding out more about HR tech for small businesses, get in touch with us today using the contact details below.



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