Buyer's Guide:

The Tough Questions to Ask Your Prospective Workforce Management Vendor

wfs | A WORKFORCE SOFTWARE COMPANY

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Introduction:
Managing Your Unique Organisation

Your organisation is unique; It's what differentiates you in the market from your competition. There are several factors that contribute to your uniqueness, including the products and services provided, geographic locations, compliance concerns, and your people. As competition becomes increasingly aggressive, rapid change remains a constant and creates unique working environments that require businesses to adapt in ways that are individual to them. Because uniqueness is your biggest weapon against change, it's important to find ways of embracing your differentiators while also making work easy for your entire organisation—from managing costs and compliance to improving the customer experience by enabling employees to focus on core business rather than administrative activities.

A workforce management solution can help, but only if it meets each organisation's unique needs. That's why we've compiled some tough questions for you to ask vendors when shopping for a workforce management solution.

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Business Value
Empowering Your Workforce

Workforce management solutions can deliver business value across your organisation in many forms, from reducing overtime costs and eliminating unnecessary administrative processes to simplifying compliance and improving the employee experience. For employees, it may be self-service functionality that lets them easily report absences and check accruals, allowing them to get back to work more quickly.

Finance and Payroll appreciate the ability to eliminate error-prone manual processes and workarounds with precise data and time capture options, pay rule automation that provides consistent and accurate payment, and streamlined approval processes that provide active notifications to address urgent concerns that could impact the business's financial wellbeing.

HR departments can simplify labour law compliance; automatically track and record all absences, including paid leave, and attendance policy violations; and receive complete coverage for all leave practices, including intermittent leaves and concurrent eligibility whether required through legislation, trade union and collective bargaining agreements, or internal policies.

Operations can benefit from optimised rosters that meet key performance indicators such as productivity, basket sizes, conversion rates, and task execution, all while reducing overall budget.

And IT directors will look for value in a solution that provides a seamless user experience for a high likelihood of user adoption, enables data sharing across the solution and other business critical systems, and prioritises data security with extensive technical and organisation measures.

Business Value
What to look for

Operational Efficiency

When it comes to running a successful business, it is critical your employees are engaged and focused on your core business and driving toward a positive impact on financial performance. However, this means something different for every organisation, and a one-size-fits-all approach won't work for most organisations. That's where a workforce management solution can help by forecasting labour and optimising rosters to account for both the needs of the business—things like KPIs, regulations, and budgets—as well as the needs of your employees—things like preference, skill set, and career goals. This way, your employees are in the right place at the right time, cutting labour costs, reducing overtime, and eliminating unnecessary spend. But maximising your workforce is more than simply knowing where and when your employees need to be. It's also important to make sure your employees are not distracted by non-urgent tasks or burdened with performing administrative functions that could be automated. A solution that promotes employee productivity by using things like AI urgency models will ensure that your employees' time is not wasted by prioritising the tasks that matter the most while reducing unnecessary administrative tasks in the background. The time that you've optimised for your employees can now be spent valuably, elevating the customer experience.

Simplified Compliance

Compliance can be complicated, but it's also key to maintaining core business and keeping your organisation successful. Automating your organisation's compliance practices prevents the risk of litigation, grievances, heavy fines and penalties while maintaining brand equity. The right workforce management solution can simplify the process by automating the compliance of complicated schedules and pay rules with all legal requirements—whether global or local, legislative or contractual—including the National Employment Standards (NES), modern awards, enterprise agreements, and internal policies.

Your solution should also support the creation of fair and predictive rosters that give employees advance notice of upcoming rosters or changes to their work hours; adhere to health and safety requirements like work hour limits, rest periods, and overtime equalisation policies; and proactively warn you of potential issues before they occur to mitigate the risk of violations.

To avoid the authorisation of excessive and unearned time off, HR departments need a solution with comprehensive absence and

leave management capabilities. With automatic balance tracking and projections of future balances that account for unique rules and planned usage, your solution should act as a single source of truth for all time off events and leaves of absence. It should also provide compliant and best practice workflows, documentation, and eligibility determination that prove compliance with a complete audit trail—from initial request to return to work.

Improved Employee Experience

Ensuring the accuracy and consistency of your employees' rosters and pay eliminates inquiries, amendments, and errors and helps guarantee that your people are treated fairly. Providing a best-in-class employee experience is essential to the operations of your organisation, and a dedicated workforce management solution can increase user satisfaction.

Self-service options not only empower your employees but also gives them easy access to key information. Your solution should allow your employees to merge their work and professional lives with self-service options like collaborative rostering that allows them to view rosters well in advance of personal commitments, easily request time off, and swap shifts with the click of a button.

No two employees are the same, and their user experience shouldn't be either. Your workforce management solution should allow your employees to personalise their user experience in a way that is meaningful to them and should allow your managers to prioritise their tasks in an urgency model that cuts through the noise of their busy day. When managers and their employees are freed from administrative activities and provided with actionable data, they will have more time to focus on the core business and allocate more effort toward development opportunities like mentorship, cross-training, and identifying career goals.

Maximum ROI

Your ROI is likely to be as unique as your business and your employees. Ask each vendor to build an ROI case for you that takes into account your organisation's specific size, processes and other relevant factors, and expect the estimates you receive from vendors to vary, based on the specific capabilities of each solution. If a vendor can't construct a tailored ROI case ahead of time, there's a good chance they won't be able to provide good service tailored to your needs later on.

Questions to Ask

Ask these questions of prospective vendors to get a better sense of their capabilities and determine which solution is best for your organisation.

Maximising Your Workforce

1 Can your solution ensure compliance with a variety of rostering needs—from predictable to highly variable?

2 Can your solution predict labour demand based on our unique business drivers and measure effectiveness of rosters based on our key performance indicators? If so, what is the minimum interval at which the demand can be forecasted?

3 How does your solution instill confidence that an employee is qualified to perform a certain job or function prior to placing them on the roster?

4 How does your system help us fill vacant shifts due to no-shows, sick call-ins, or unplanned changes to the workload?

5 Can your solution help us identify emerging trends, best practices, and employee development opportunities?

Reducing Your Payroll Costs

6 How can your solution help us reduce labour costs related to excessive overtime and inflated time reporting?

7 How does your solution handle amendments to prior period timesheets and changes to policies that are effective retrospectively?

8 How does your solution handle off-cycle payments?

9 Can your solution support employees who work in more than one job that may require separate approvers, pay rates and rules, and leave policies?

Simplifying Compliance

10 Does your system have pre-built best practices for legislative laws and other common or generally accepted policies?

11 Can you demonstrate how your system can automate a few of our very complex and unique rules for consistent, accurate application every time?

12 In the event of a complaint, how can your solution help us prove compliance with legislation and other legally binding requirements?

13 Can safety violations be tracked in the solution and can we be notified when an employee is approaching or exceeds a threshold?

14 How do you help us simplify, maintain, and prove compliance with leave regulations and other unique organisational time-off and leave policies including intermittent leaves—concurrent or otherwise?

Tracking Labour Costs and Improving Productivity

15 Does your solution allow us to accurately support tracking time and calculating labour costs against applicable cost centres including funding sources, projects, work orders, departments, tasks and monitor those costs against associated budgets?

16 How does the solution ensure allocated time aligns with paid clocked time?

17 How will your solution improve overall productivity across each key department in your organisation?

18 How will your solution enhance our employee experience?

Building and Proving a Business Case

19 Can you provide a sample of ROI forecasts for existing customers that have similar challenges?

20 What is the typical payback time in months for organisations of our size and complexity?

21 What hard benefits, beyond measures of cost control or reduction, does your solution provide?

22 What soft benefits does your solution provide and can you provide case studies from existing customers that quantify this?

Future Readiness
Enabling Growth and Preparing for Tomorrow

Because both unforeseen challenges and new opportunities can arise, and because your strategic goals can change, you need a solution that's able to adapt to your vision for the future. A robust workforce management solution can help to define your organisation's digital environment in years to come, and increase your ability to grow and adapt. Your vendor should be able to offer a roadmap that meets your needs today and tomorrow without customisation.

Your workforce management solution should be designed to grow with your organisation, whatever that looks like, be it product or market expansion, acquisition, or diversification. Effectively managing a workforce through change can be tough, which is why organisations should find a solution that offers adaptability regardless of the situation.

What to look for

Commitment to Cybersecurity

According to IBM Security's annual study for 2019 across 16 countries or regional samples, the financial impact of a data breach now costs the average business 3.92 million USD. With personal employee information, hours, pay rates, and other unique data at risk, it's crucial to select a solution that prioritises data security, with regular security audits and software updates, established privacy routines, and strict authentication processes. Ask prospective providers to provide an in-depth explanation of their security measures, including how they comply with the General Data Protection Regulation (GDPR).

Risk Mitigation

Given the prevalence of ever-changing rules, it's important to look for a workforce management solution that automatically enforces rule changes—whether legislative, union and CBA rules, or complex pay policies—and also alerts managers when things like overtime thresholds are met. In addition, maintaining electronic audit trails and storing your data in a completely secure, ISO 27001-certified, cloud-based solution will ensure that, regardless of future changes, your organisation will be protected from unexpected regulatory shifts and hefty fines.

Rule-Based Flexibility

Workforce management automation needs to keep up with your ever-changing needs. Walk through some hypothetical scenarios to test if, and how, a solution could handle them. Then, discuss some of your more unique challenges or ask the vendor to recount some of the more unique workforce circumstances they've successfully automated.

When it comes to flexibility, there are two types of solutions. **Parameter-based solutions** can deliver economical workforce automation, but with a limited set of capabilities that may not meet all of an organisation's unique needs.

Alternatively, **rule-based solutions** allow any scenario to be captured by defining rules that can be configured to meet all of the organisation's needs. The configuration is typically carried out during deployment of the solution and validated by the end user.
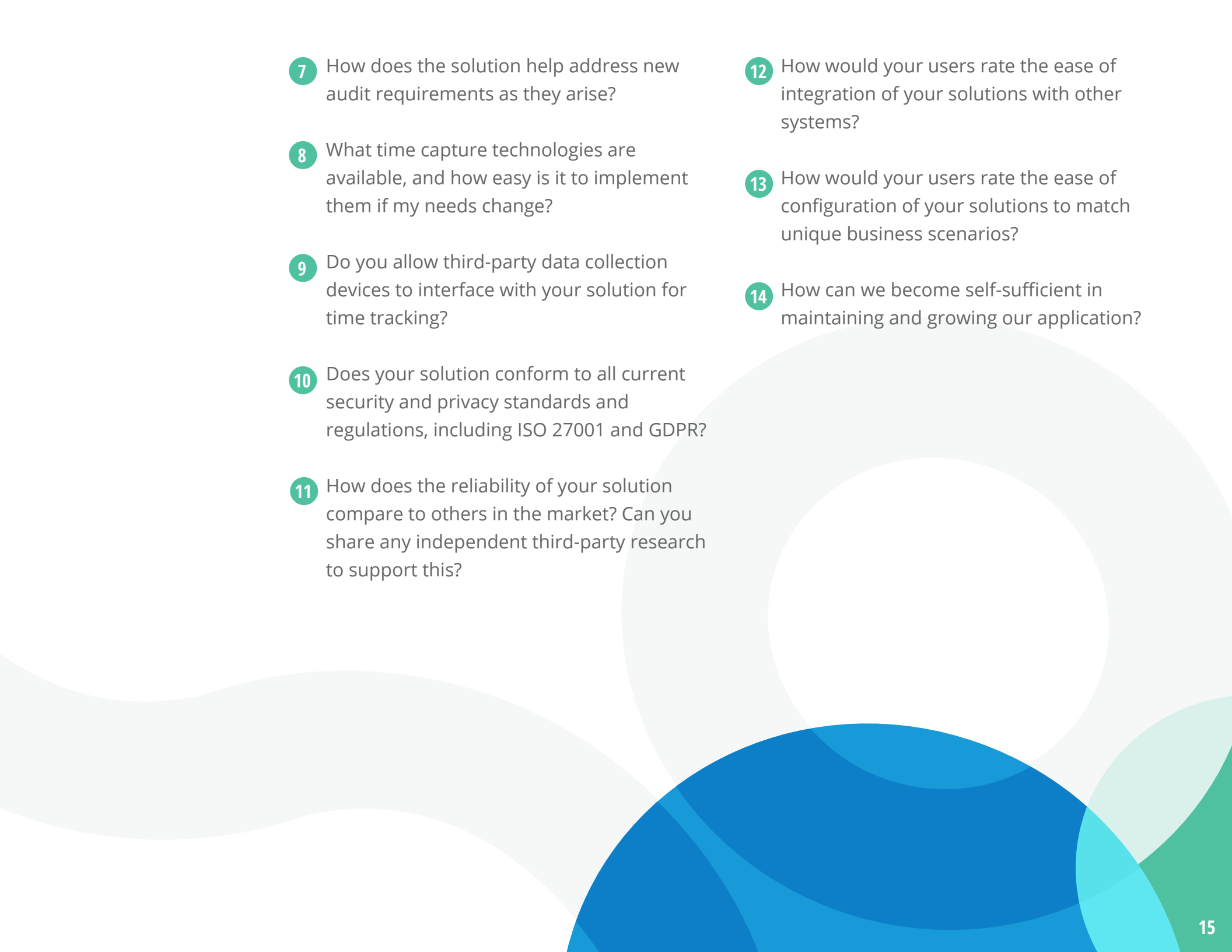
Any organisation will benefit from the flexibility and future readiness that a rules-based solution provides.

Questions to Ask

Ask these questions of prospective vendors to learn how well they'll help you prepare for the future.

1 What urgent market problems relevant to our industry is the vendor focused on solving?

2 If we look to expand our organisation to include new geographies, segments, products, or services, how will your solution support our growth strategy?

3 Does the solution automatically calculate all rules and maintain a complete audit for any changes made?

4 Are you rules- or parameter-based, and how could you automate the management of our more unique scenarios?

5 If our working rules change in a way that is not supported by the parameters in your solution, how will you support our needs?

6 Are you willing to show us an in-depth product demonstration that includes business requirements specific to our organisation?

7 How does the solution help address new audit requirements as they arise?

8 What time capture technologies are available, and how easy is it to implement them if my needs change?

9 Do you allow third-party data collection devices to interface with your solution for time tracking?

10 Does your solution conform to all current security and privacy standards and regulations, including ISO 27001 and GDPR?

11 How does the reliability of your solution compare to others in the market? Can you share any independent third-party research to support this?

12 How would your users rate the ease of integration of your solutions with other systems?

13 How would your users rate the ease of configuration of your solutions to match unique business scenarios?

14 How can we become self-sufficient in maintaining and growing our application?

Innovation
Driving Positive Change for your Organisation

Creativity develops new ideas. Innovation makes them happen. Advancements in technology will continue to transform the market in which your organisation operates, requiring you to continuously adopt new methods of generating competitive agility. You can help support a culture of innovation with workforce automation that's capable of collecting and processing the data to support the digital transformation efforts across your business.

Choose a workforce management solution with a proven history of innovation and a commitment to continuous improvement. Successful innovators help their customers evolve along with them—find a partner who will keep you moving forward.

Innovation

What to look for

Actionable Data

A workforce management solution should provide ample visibility into your entire workforce operations. You should be able to view sick days and overtime hours worked—to identify trends and compliance issues, safety violations, potential areas for improvement in the workplace, overtime cost, labour cost by pay code, overall spend, scheduling, absenteeism, seasonal fluctuations—and more. Your solution should also collect, aggregate, process, and store data in an actionable, easy-to-understand interface that prioritises the most urgent items first so that you can quickly analyse the data and act on it with urgency. In a highly competitive landscape, the ability to act quickly and confidently on key workforce data can transform your organisation's operations and set you above the competition. Ask your vendor if the solution collects, aggregates, processes, and stores data in an actionable, easy-to-understand interface, so that you can quickly analyse and act on it.

Efficiency Reinvented

Innovative workforce management solutions allow improved productivity tracking and free up time and energy with features like mobile time-off requests, multiple, streamlined ways to punch-in and punch-out, a variety of time recording methods including badge readers, web clocks and electronic check-in points, and more. Ask your vendor about their upcoming features, and how they apply to your specific challenges.

Regular Updates

Choose a vendor who's committed to the future improvement of their platform, so that today's investment doesn't become yesterday's technology. Does the solution receive updates regularly through the year? If not, consider that a red flag which could hinder your ability to stay competitive in the future.

Simple Integration

Oftentimes, workforce management solutions need to work within complex software environments addressing specific functions. These third-party systems can range from data collection tools, to work order management platforms, to HR and payroll solutions. While workforce management software can often do the work of these solutions, it should also share data across business-critical solutions and enable a seamless user experience. This way, employees don't feel the burden of working with multiple, unintegrated systems and your organisation receives valuable and actionable insights to elevate customer service and improve overall financial performance.

Innovation
Questions to Ask

Ask these questions of prospective vendors to learn more about their commitment to future innovation and improvement—theirs and yours.

1. Does your solution proactively alert users when time-sensitive matters need to be addressed?

2. Does your solution provide a prioritised view of actionable insights that minimise navigation and administration time?

3. Do your options for integration with 3rd party systems include modern APIs?

4. Is your solution embeddable within 3rd party solutions for a seamless user experience with our HCM and ERP solutions?

5. How can the solution foster strategic decisions to benefit a company's growth?

6. How often are the features and functionalities of the solutions updated to improve usability?

7. Is your user interface design mobile optimised and responsive on any form factor?

8. Are you leveraging artificial intelligence technology to deliver digital assistance that makes work easy for employees and managers?

9 Does your product team use a set of accepted design principles when considering user experience and the user interface?

10 What is your formal process for channeling product ideas from users to your product team?

11 Do you run a customer advisory board? If so, what is the criteria for membership?

12 How often is your solution updated each year?

13 Do you have a formal process for sharing and gathering feedback on your solution's strategic roadmap?

14 Does every upgrade require the solution to be fully re-configured and tested?

15 How would your users rate your culture of innovation, are you viewed as continually improving or stagnant?

16 Has the proposed solution been available in the cloud for more than 5 years?

Partnership
Selecting a Trusted Advisor

While a new workforce management solution should make your job easier, it won't prevent new and unique challenges in workforce management problems from arising. That's why you want a partner who can help you navigate the new challenges, while easing the old ones.

Partnership

What to look for

Understanding Your Unique Challenges

Because one-size-fits-all solutions weren't designed with your organisation in mind, your vendor should have a dedicated team available prior to implementation, to identify your challenges and the configuration that best fits your specific needs. Are they investing in getting to know your organisation—from building an individualised ROI case to help you sell the solution to decisionmakers, to providing a product demo that addresses your specific scenarios?

Culture and Commitment

You want a company that stands behind the solution, not one that hides behind it. That means choosing a partner who's as interested in learning about your challenges as they are in selling the product's features. Try to get an understanding of the team you'll be working with, and how you'll be working with them. Are members of the team available to talk to you in advance? If so, take advantage of the opportunity to get to know their approach to dealing with your unique workforce challenges.

Support

Your vendor should offer multiple types of support, so you can work according to your preferences. Look for a team that can guarantee personal attention and service from the start of an issue to the resolution, including regular live phone support and 24/7 support for critical issues, as well as a regular set of support contacts. Ask about other online support options and expedited repair/replacement options.

Trust and Transparency

Business relationships are built on trust, but that trust needs to be earned. A vendor should get acquainted with your operations, processes, goals and objectives, and provide you with the materials you need to fully understand the rewards, financial and otherwise, of working together. Ask for case studies, customer testimonials, and other materials to determine whether or not they're what you'd expect from a trusted advisor.

Partnership

Questions to Ask

Ask these questions of prospective vendors to find out more about their potential as a partner.

1. Do you offer an executive sponsor program for customers of our size?

2. How would you summarise your company's culture? How do your users rate your trust and transparency?

3. What is your approach to customer success?

4. How would your users rate your ability to negotiate contract terms in good faith and with the customer's interests first?

5. How would your users rate the fairness of your policies regarding charges for product enhancements vs providing them for free?

6. How likely are your users to recommend your solution, do you have data to support this?

7. How would your users rate your overall services experience, frustrating or effective?

8. In the event of a disaster, do you offer a recovery point objective of less than 2 hours?

9. Have you had any security breaches in the past year? How did you help the customers involved?

10. What is your employee retention rate across the organisation? What is your customer retention rate?

About WFS Australia

WFS Australia is a provider of cloud workforce management solutions that empower employees and managers to digitise time and labour processes, optimise demand-driven rostering, simplify absence management and enable strategic business insight. Our solution, the WorkForce Suite, adapts to your organisation's specific workforce management requirements no matter how unique your pay rules, labour regulations, rosters, and employee self-service needs are.

Whether your employees are global, unionised, full-time, part-time, mobile, or seasonal, we make managing your workforce easy, more rewarding, and less costly. WFS Australia is the only vendor in the HCM space who focuses exclusively on the workforce management needs of today's complex enterprise.

To learn more about how the WorkForce Suite can help your organisation cut labour costs and gain access to actionable metrics, organisation-wide, visit www.WFSAustralia.com