



# Implementing HR software

5 simple steps to success

**naturalhr**  
TRANSFORMING BUSINESS

# About Natural HR

Designed by HR professionals for HR professionals, Natural HR is core Human Resource Management and payroll software for growing businesses.

Headquartered in Birmingham, Natural HR delivers an all-in-one solution for HR teams managing a workforce of over 100 staff.

Entirely developed in Birmingham, and proudly so, Natural HR was founded in 2010 by husband and wife duo, Jason and Sarah Dowzell. The software delivers everything a HR department needs to support and manage their people, freeing up valuable time to focus on their organisation's strategic HR objectives.

Available on any web-enabled computer or smartphone, Natural HR delivers an industry-leading suite of tools that simplify and automate HR and payroll processes for management and employees alike.

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# Introduction

So, you've invested in HR management software. Good on you. You're one of the 64% of SMEs that have taken the plunge ([Workforce.com, 2019](https://www.workforce.com)).

But are you feeling a little overwhelmed at the prospect of implementing it? Drowning in buzzwords being thrown around? Data migration, reports, workflows? If you're solely responsible for HR in your company, it can feel like a mammoth task.

Well, you're not alone. When buying HR software, a staggering 85% of professionals cited 'time to implement' as a hindrance ([SelectHub.com, 2019](https://www.selecthub.com)).

In this guide, we'll share our blueprint for a successful implementation; making your decision to introduce HR software to your organisation a simple and logical one.

Implementation should not be feared, it poses a huge opportunity for your business to streamline processes, improve employee engagement and consider your approach to data management. And what's more, once it's done properly; it's done.



01

Implementation prep

[Research published in Forbes](#) estimates that a staggering 54% of software implementation projects fail due to poor management. At Natural HR, we've supported countless implementations of HR software and have found the most successful all share one common denominator: **preparation**.

Whether you're implementing HR software, CRM or marketing automation; there will always be forethought, planning and preparation required on your part to introduce any new software.

After all, implementing HR software is a project, not a single task. So, what can you do to effectively prepare your business for a new HR system?

**Enlist a team of champions and assign responsibilities:**

Involving the right people in your project from the get-go can make or break your implementation. This shouldn't be decided based on who has the most time available, but who is suitably experienced, with the right insight into business processes and technical know-how.

Naturally, HR has to be involved given their extensive knowledge into the practices and processes that will determine the set-up and configuration of the software.



The team should include an IT lead to handle needs and concerns surrounding configuration and integration with other systems, along with a small sample of end users for testing and feedback.

**Brian Westfall, Senior Analyst**

— Gartner

Any good implementation should have a designated Project Manager (PM) to oversee and manage the project from start to finish. This person should be responsible, hard-working, dedicated, a team player and above all, have leadership qualities to lead the entire team working towards the launch of your chosen HR software.

Equally, IT should be involved early on in the process. Your IT department are likely the savviest when it comes to implementing software. Particularly during the data migration phase of implementation, IT will be a true lifeline in getting your data formatted correctly and ready for upload.

Once your dream team is assembled, assign responsibilities. Who will gather your employee data? Who will take care of the configuration? Who will conduct the training? Who is responsible for overseeing the whole project and assessing the outcome? Getting the right team on side to lead the implementation of your HR software can make all the difference in its success.



**Head of HR**

- ✓ Knowledge of HR practices
- ✓ Involved in buying process
- ✓ Understanding of workflows
- ✓ Access to employee data



**IT Representative**

- ✓ Experience of implementing software
- ✓ Data savvy
- ✓ Security aware



**Project Manager**

- ✓ Very organised
- ✓ Able to lead a team
- ✓ Deadline-driven
- ✓ Not always a PM by trade

### Create a timeline and set key milestones:

Working together with your vendor, establish a timeline that is both realistic and achievable for you both. Understand what you need to do, when your data will need to be ready by and which people need to be available to help and support the process.

The implementation phase is critical to long-lasting success so take your time mapping out each stage of the process: how long will each task take, who is responsible for what, what dependencies are there?

Consider the workloads of your designated project team and their other priorities that might impact on your project. Once again, be realistic in your estimations. Implementing any kind of core business software doesn't happen overnight.

Most good software vendors will use a project management tool (Asana, Trello, Basecamp or something similar) that will allow for collaboration on a timeline and ensure complete visibility of roles, responsibilities and deadlines. There is no use if all the communication with your implementation manager is holed up in one person's inbox who just happens to have gone on holiday for two weeks.

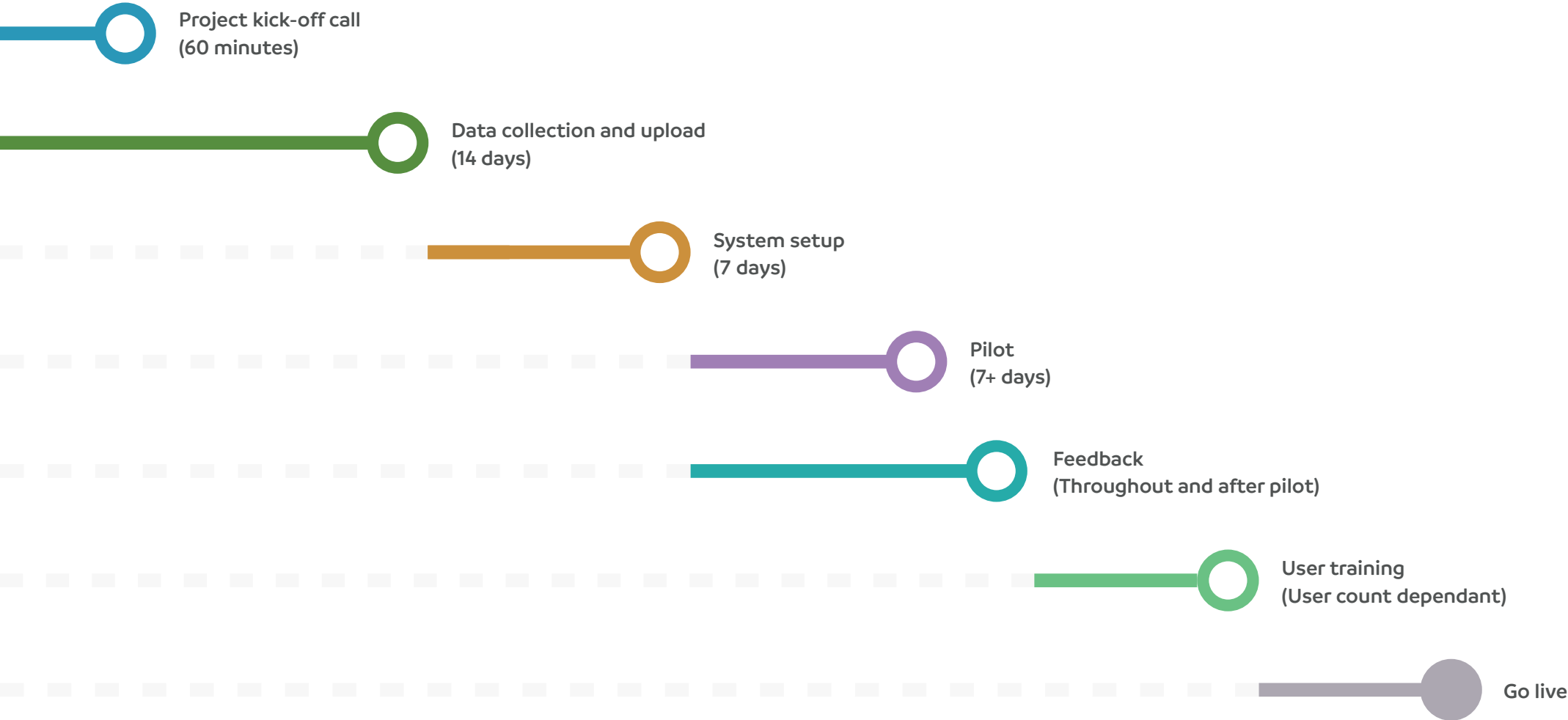


Some of the benefits of project management tools and techniques like Asana and Trello include streamlined communication, a more focused project scope and a project team that more readily stays on the same page.

— BizFluent.com, 2019

So, it's important to plan ahead. Set aside time in your diary to communicate with your implementation manager. At the end of the day, this is a two-way process. These project management tools are there to keep your project moving, with complete transparency for everyone involved.

EXAMPLE IMPLEMENTATION TIMELINE





### Define your requirements and processes:

Implementing new software is a good time to revisit your current processes and determine whether they are as effective as they could be. Are your current processes convoluted? Do you have some unnecessary red tape that stalls efficiency? Are there opportunities to save large amounts of time? Automating processes that are already ineffective is pointless, so use this as an opportunity to re-think how you currently do things.

How do you currently approach HR relevant tasks like on-boarding new starters, booking annual leave or holding performance reviews and most importantly, what can be done better? Now think about how this will translate into your chosen HR software. What workflows will you need? What does your chain of approval look like? Who needs access to what? What are the key steps involved in your processes? Granted, there will be some process change and it is important to remain open-minded to new ways of doing things.

Have a clear plan of what you actually need your HR software to do and keep it front of mind throughout your implementation process. And be cut-throat! Do you really need to opt for all the bells and whistles a system has to offer just because they're available or could you opt for a phased approach to rollout?

“Projects with effective communication are almost twice as likely to successfully deliver and meet quality standards than projects without effective communication. (68% vs 32% and 66% vs 33%, respectively).

— PwC Global CEO Survey, 2012

The 'big bang' approach to IT rollouts has fallen out of favour recently, with many organisations preferring to phase in new elements of HR systems over a defined period of time rather than launch everything at once.

Prioritise your 'must haves' and consider whether your 'nice to haves' are really a necessity right now.

### **Communication, communication, communication:**

To get maximum buy-in, staff need to feel involved in the process. With any form of change, if people feel that they are being kept in the dark, they will become resistant. Ensure that the employees who will be directly affected by your new software understand the reason behind implementing it and how it will benefit them.

HR software in particular is one of very few solutions every single person in your business will use – so, tell them about it!

Engaging employees early on will put your project in good stead for long-lasting success. Explain what is changing and why you are changing it. What is in it for them? The initial goals and objectives of introducing HR software should be properly communicated to those that will be expected to adopt it. Whether in a company-wide meeting or informal chat over a bought-in lunch; getting your employees involved will make all the difference when it comes to adoption.

# 02

## Migrating your data

Now comes the process of making your HR software 'yours'. Together with your team of champions, you will need to gather the data that you require. The more that is already stored digitally, the better as this will speed up your data migration process.

One of the main reasons HR systems fail is the quality of data. It is absolutely paramount that data is thoroughly cleansed before migration to the new system. There is no point in degrading the system before you have even started with it.

Remove inaccurate data, update email addresses and telephone numbers, check job positions, line managers and salaries. Consider where your holiday and sickness records are kept as well as employment documents such as contracts, CVs and job descriptions. How will you gather and compile data sets for holiday history, sickness history, training records and expense claims?

Though it can be an arduous task to compile hundreds of employees' information, it is better to do this thoroughly and correctly now rather than once you are live. If it is needed, spend those few extra hours cleansing and formatting your data; it will pay off later.



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Understand both the data source and target, meaning where the data comes from and where it's going. Once you understand the source and the target, you can start to map out your process.

— [TechnologyAdvice.com](https://www.technologyadvice.com), 2017

Think about the level of data you require for go-live. Most good HR systems will let you go live with an initial upload of basic employee data (names, job titles, seniorities, department, site, personal details etc) with the ability to add more data, documents and change settings after you go live. However, consider if there is an additional workload to enrich data further on a future date. Will it be more effective to upload all your data in one fell swoop?

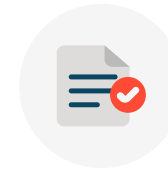
Below are a few handy tips when it comes to collecting and preparing your data:

- ✓ **Be consistent:** particularly in your naming conventions. If your employee data has a 'Christopher Smith' on file but your holiday record spreadsheet has him down as 'Chris Smith' – the system will treat these as two separate employees so the employee records will not be merged.
- ✓ **Be ruthless:** strip out any old or unnecessary data that is no longer needed.
- ✓ **Ask for help:** use your IT department to help with data cleansing and formatting ready for upload. It is much better to get your data right before uploading it rather than having to edit it at a later stage.
- ✓ **Update records:** ensure there are no gaps in employee data. For example, if only half of your employees have phone numbers associated with them, this is the time to update your records.

Throughout the collection and formatting of your data, be mindful of the sensitive nature of the information with which you are dealing.

Compliance with the GDPR means rigorous security practices and an awareness of what the GDPR means for the configuration of your HR software.

Assess whether the data you are importing is absolutely necessary to have on file and delete any you don't need. The GDPR places greater importance on timely document deletion – companies can be fined for holding on to data they don't need. And make sure the right employees have the right level of access when it comes to viewing employee data. Only those roles who truly need employee data should be able to access it.



### **Right to rectify**

Employees can request their data be updated or completed.



### **Right to be forgotten**

Employees can request that their data be completely erased.



### **Right to object**

Employees can object to your processing of their personal data.



### **Right to a copy**

Employees can request a copy of the data you hold about them.

03

Piloting your HR software

Piloting your new suite of software can be an integral part of your implementation. Usually consisting of a cross-section of your eventual user base, a pilot will allow you to test what using your new HR software will be like in the 'real world'.

Not only does a pilot minimise the risk of an unsuccessful implementation later but gives your employees and users hands-on experience with the software. It can be used to 'train the trainers' too so that your initial go-live is rolled out smoothly to all employees.

When implementing HR software, your pilot might involve trialling workflows, using features that will be used the most (such as booking annual leave, claiming expenses and on/offboarding of employees) and evaluating the logic of HR-related processes (chains of approval for annual leave, on-boarding checklists or return to work notifications).

With the goal of ironing out any technical problems as well as identifying any changes to existing processes that will need to be communicated to the wider team; running a pilot can help to establish any teething problems, resolve queries and better understand how it will be used upon go-live.

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A pilot is a practice area for rehearsing practices and procedures. Under most circumstances, pilots allow teams to execute and attempt particular tasks, without significant pressures or money at stake.

— Project Management  
Institute, 2012



It is important to form a user group that accurately represents your business for your pilot. That is, don't have just managers making up your entire pilot user group. Where possible, include a mixture of seniorities, locations and departments as each will have their own different requirements and ways of using the system.

The length of your pilot will vary depending on the volume of tasks you expect your HR software to be capable of. If staff are only expected to book time off and use it as a repository for employee data, your pilot could be as short as 7 days. However, if you are using an all-in-one solution that will be your core system for expenses, holidays, payroll, training etc – your pilot might extend to 30 days or more.

Encourage open, honest feedback from your pilot and understand what is and isn't working as expected.

Once you have gathered feedback from your pilot users, evaluate and discuss the results with your project team to understand what, if anything, needs to be better explained to users, updated or changed before rollout. Use this information to tweak your implementation plan and optimise the eventual user experience.



## Pilot feedback

- How easy did you find the software to use?
- How intuitive was it?
- Did you encounter any technical issues?
- Are there any areas you don't understand?
- Where do you think most training is needed?
- What worked well?
- Where did you encounter efficiencies?

# 04

Training your users

When deploying new software, your end-user training strategy is crucial. It is important that your people can use the new software with confidence and use it to its full potential. But so often this aspect gets forgotten or rushed.

Implementing new software of any kind is a big change for many employees, but especially so when you are implementing HR software. Given every one of your employees will likely be using it to book annual leave, sign documents or claim expenses; ensuring they have been trained and given time to adjust to your new software will be key to its ongoing success.

Engagement is a key factor in the success and uptake of any kind of software and your employees need to be prepared for some level of change to the ways they have done things before.

Start by defining your user groups. The tasks your line managers need to be able to complete in your HR software are very different from what their team members will need to do.

Managers will need to understand how to approve holiday requests, monitor absences and schedule performance reviews. Whereas their team members will need to be able to request holiday, check documents and submit expenses.



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Training isn't just helpful - research has shown that it's essential to the implementation process. It can help businesses to avoid setbacks, errors, employee turnover and other general frustrations while facilitating a smooth transition from paper to an electronic system.

— SoftwareAdvice.com, 2017

Equally, your HR and payroll departments will need a far more thorough training program that allows them to administer the platform in line with their day-to-day jobs.

Ultimately, all your employees will need to know what they are expected to do upon go-live, how to make it easy to transition to this new system and what impact it will have on their pay, benefits and life at work. Will it be an overnight move to the system or will there be a transition period where certain tasks are still performed outside of the software?

The next step is to assess methods of delivering the necessary training. Most providers of HR software offer a variety of delivery methods when it comes to training. From on-demand tutorials and live online training/webinars to face-to-face classroom style sessions; the kind of training that is suitable will vary from business to business.

If your software vendor offers an in-depth manual or training guide, employees may be able to self-train using the materials provided. This can save time and cost, and make it easy to train many employees with varying schedules.



## Things to consider

- ✓ **User skill levels:** those that have experience using HR software may need less training than those completely new to it.
- ✓ **Number of users to train:** how many employees need training? Are they all based in the same location?
- ✓ **Your project timeline:** be careful not to train too early before go-live so your employees become disengaged and forget everything they've learnt upon rollout.

Alternatively, classroom style training allows employees and managers to take a break from their office and really focus on learning about the new system, away from daily work distractions, whilst encouraging interaction and questions.

Regardless of the kind of training you choose for your business, ensure someone from your HR department is present or on-hand for it. They will be able to answer questions around any changes to internal processes and workflows and explain the reasons why these changes have been made.

Nominating an internal champion (or point of contact) can also help with resolving first line support for your users if they have any quick questions or issues.

How do I request annual leave?

Where can I submit my expenses? How do I do it?

How do I access my contract or other documents?

Where can I update my personal details?

05

Rollout of your software

You're ready to rock, your pilot went down a storm and your users have been trained. So, you can hit 'go' now, right? Not quite.

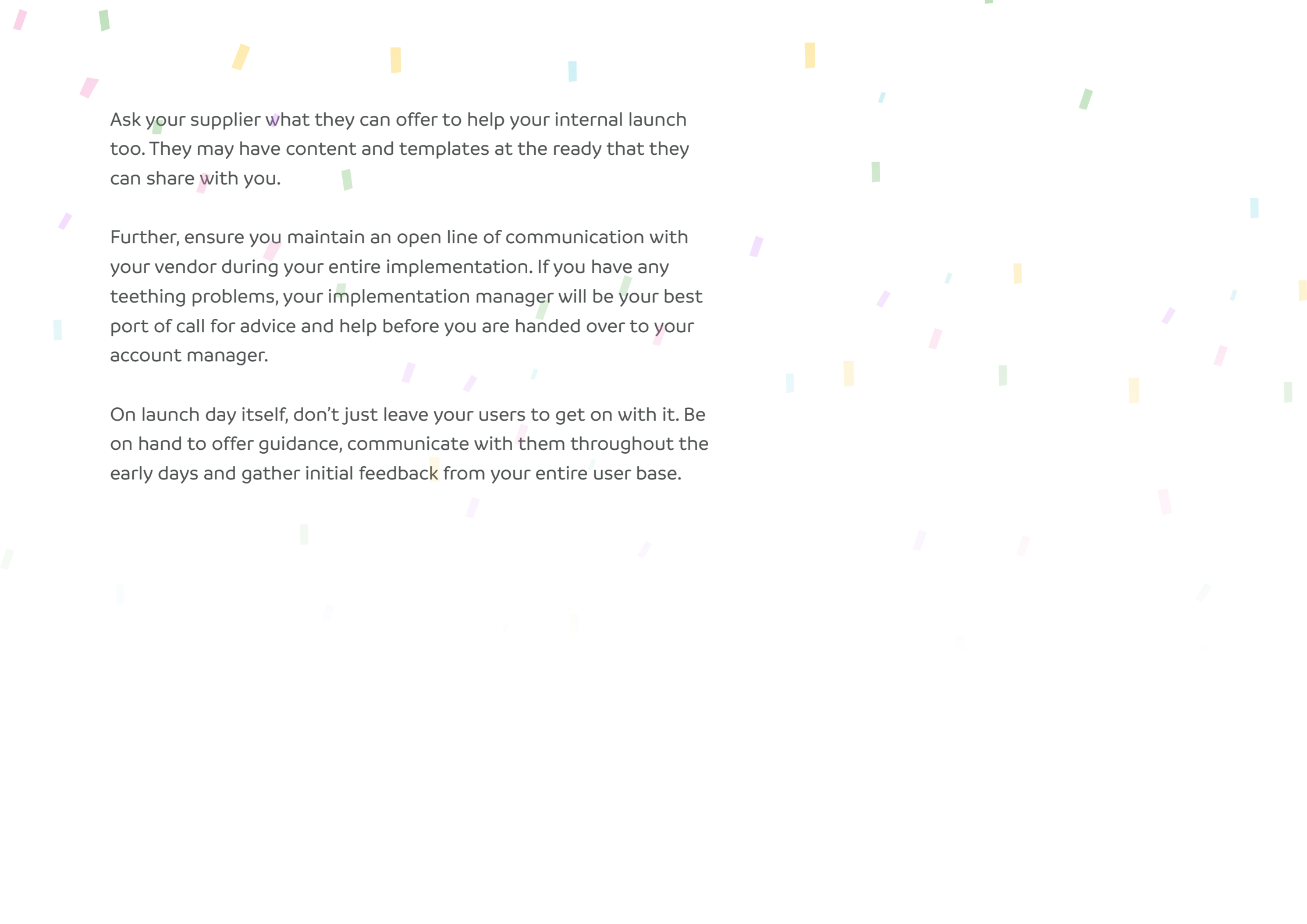
A successful go-live will be significantly enhanced if communication with your employees is made clearly and in good time.

Implementation does not equal adoption so engaging your employees early on in this process should be a high priority.

Take the time to explain 'what's in it for them' and how they will benefit from this HR software. Importantly, don't fall prey to becoming a dictatorship but share the value this will bring to your employees. Your employees need to know the reasons why they are using the software to ultimately understand the benefits to them and your organisation.

Your training program should have prepared your employees for going live with your new HR software, helping to minimise the chance of a queue at HR's door for support on the system on day one! But ensuring your users are as excited as you are can make all the difference on the day of go-live. Enlist the help of your marketing team to create internal posters that announce launch day, create FAQs that answer the questions you're expecting on day one or hold a HR takeover of your company's internal news or intranet to share tips, tricks and advice.





Ask your supplier what they can offer to help your internal launch too. They may have content and templates at the ready that they can share with you.

Further, ensure you maintain an open line of communication with your vendor during your entire implementation. If you have any teething problems, your implementation manager will be your best port of call for advice and help before you are handed over to your account manager.

On launch day itself, don't just leave your users to get on with it. Be on hand to offer guidance, communicate with them throughout the early days and gather initial feedback from your entire user base.



# Learn more

Join hundreds of happy customers who use Natural HR every day to help them manage employees more effectively. Get in touch today to arrange a free one-to-one demo.

★★★★★ Based on reviews from  G2 |  CROWD  Capterra

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“On many systems, you had to put a hell of a lot of work in behind the scenes before it would look anything like it does in Natural HR from the employee’s point of view.

Richard Flanagan, HR  
— Consultant

 Riverwell Ltd

“We work with world-leading software. That’s what we sell to our customers. Not having an HR system that was at least fit for purpose, if not best in class, just didn’t fit with our culture.

Helen Scares, Human  
— Resources Manager

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