



Workforce Management Software Buyer's Guide

Your guide to making
the best WFM choice



Introduction

Workforce management (WFM) is an organizational method and approach that helps you maintain a productive workforce. It includes tools for supervising mobile and remote employees, scheduling employees and administering leave. WFM also allows organizations to make decisions based on labor tracking and job costing, and to leverage document management capabilities to avoid risk.

Genuine workforce management happens when organizations integrate key activities into one platform. Thanks to technology, every industry can now deploy workforce management software that supports the entire organization.



Introduction cont'd

Regardless of the size of your organization or your role, chances are you're looking for information about how to choose the right workforce management (WFM) software because:



- Your organization is experiencing such growth and change that your current solution no longer meets your needs.
- A recent system or process failure led you to seek out insights about better methods.
- The new strategic plan highlighted the need to implement new workforce systems and processes.

Whatever brought you to this search for a WFM solution, you're in good company. Many organizations are realizing a need to elevate their workforce management approach.

Use Systems to Empower Workforce Management

Given recent global challenges, agile workforce management systems have become more critical than ever.

“In a remote and hybrid work setting, technology continues to have even more of a direct impact on the day-to-day work of employees and how they collaborate with each other,” states [an analyst from Gartner](#). “Yet it is becoming increasingly important for HR leaders to plan for their technology investments with more caution than in years past.”



Gartner notes five key trends that are crucial for HR leaders to address today's workforce challenges:

Ensuring solutions that enhance and uphold privacy.

Using "anywhere operations" that employees can access regardless of location.

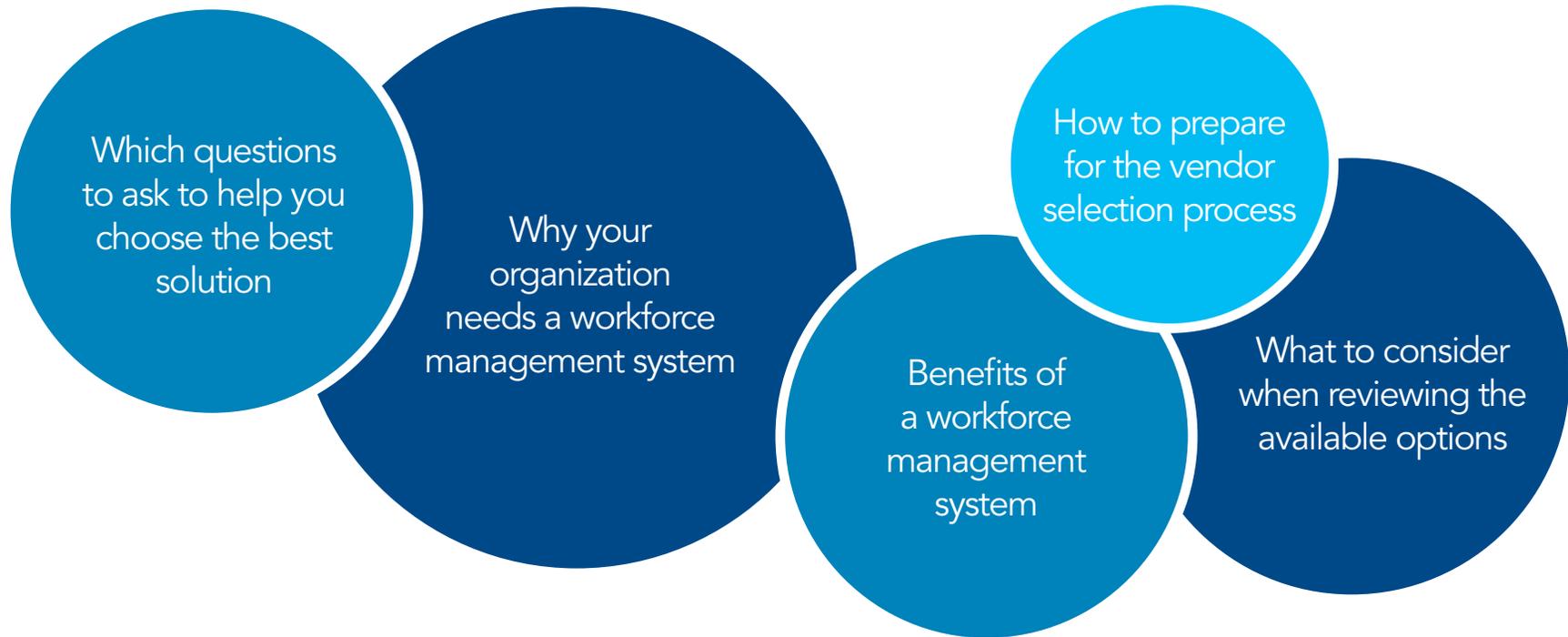
Deploying software that works across various devices.

Establishing cybersecurity and secure digital access

Integrating technologies to enable automation.

You may know your organization has outgrown the current approach, but updating your systems or implementing workforce management software can feel overwhelming for the first time. You're also likely feeling the stress of needing to choose the right solution that will meet existing and future needs. The bottom line: it's tough to know where to start. That's where this guide comes in.

This buyer's guide will help you understand:



We'll guide you through key steps to help identify what you need to consider and who needs to be involved. Selecting a workforce management solution may seem like an ominous task, but with this guide, you have what you need to ensure you will be prepared for a successful journey.

Benefits of Better Workforce Management

You don't need convincing that there's a better way, but here are some examples of the benefits your organization will experience with more effective, efficient workforce management systems:

Consistently meeting financial targets, project timelines and staffing goals.

An easy way for managers to create, share and update schedules.

A leave management process that's simple to track and administer.

Fast, efficient and accurate data transfer to run payroll that meets regulatory compliance.

Digital systems and tools that enable you to track, manage and boost operational efficiency.

With these benefits in mind, it's time to take the steps that will help you analyze and review the impact a workforce management solution will have on your organization.

Why Your Organization Needs a WFM System

In today's constantly evolving business environment, effective workforce management is an essential organizational process that includes the essential activities required to maintain a productive workforce, including managing mobile or remote employees, employee scheduling, leave management and document management.

If workforce management is an entirely new undertaking for your organization, our eBook, "[Everything You Need to Know About Workforce Management](#)" will help educate you on the terms and definitions involved with workforce management solutions, as well as the challenges WFM will help you solve. Two of the immediate benefits of implementing WFM software are **improved productivity** and **employee empowerment**.



Improved productivity

In the simplest terms, productivity requires that you're effectively managing your workforce. For an organization to be successful, its employees must be productive. Unfortunately, according to research, a significant amount of time is wasted in the workplace. [Finances Online](#) reports that:

60%



of employees' tasks include work to organize files and communicate about tasks

49%



of American employees openly admit to time theft, which can cost as much as 7% of gross annual payroll

Employees spend up to

four hours a week

on unproductive tasks



These issues and others have a significant impact not only by creating unnecessary costs but also by decreasing employee satisfaction. If workforce management software doesn't engage employees, your chances for success are severely limited. According to [technology marketplace advisor G2](#), employee engagement with software has a significant impact on its organizational longevity and success:

24.06%



of employees have considered leaving their job because they didn't have the right software

51.95%



of employees are unhappy at work because of the software they're using

Thankfully, you can support and enhance employee productivity and organizational effectiveness through a system that enables effective time and attendance, leave management and document management. With the right tools, your leaders, managers and supervisors have access to the information they need to handle labor and scheduling, manage employee leaves and retain important documents.

Empowered employees

Workforce management software not only helps streamline management activities in a way that enables you to achieve organizational goals, but the right system also helps your employees work more efficiently and effectively. WFM systems improve transparency by giving employees access to view the hours they've worked, their schedules, leave accruals and other personal information.

Not only does employee self-service in WFM software reduce the need for manager or HR assistance but it also empowers employees to review data prior to approval to ensure it's accurate. This level of autonomy is what employees have come to expect from top employers.

With the understanding that your organization needs a workforce management solution that can improve productivity and increase employee empowerment, you're ready to start talking to companies that provide WFM solutions.



Prepare to Request and Review Information from WFM Providers

To choose the right workforce management solution, you need to align on “must-have” and “nice-to-have” capabilities and establish comparison criteria to ensure all systems are reviewed fairly.

Before you meet with vendors, define these essential parameters:

- Articulate your workforce management goals and the issues you want the system to solve.
- Draft a list of system requirements; prioritize each item based on necessity.
- Review your timeline to establish ideal dates for system implementation and go-live.
- Identify who should be involved in the system review and selection process as well as who contributes to the final decision. **Note:** *if your organization has “represented workers,” such as those from a union, make sure they have representation during the system selection process.*

It's essential to identify these parameters before you start requesting system information from vendors. Gather the necessary input and information so that you can explain and inform vendors what you need.

In addition to identifying your parameters, there are questions you must ask to gather the information you need – from your internal stakeholders, as well as your vendors.

Questions to Ask Stakeholders

#1

Does our WFM system need to integrate with other systems, such as payroll, enterprise resource planning (ERP) or human capital management (HCM)?

#2

What system capabilities do we require beyond basic time tracking (e.g., labor tracking, job costing, leave management, document management)?

#3

How do we want employees to access the system (e.g., via wall-mounted clocks, web-based access or mobile options)?

#4

How do we anticipate employees will react to this change?

#5

What change management and communication resources do we have to help ensure successful implementation and user adoption?

Questions to Ask Vendors

#1

How long will implementation take for an organization of our size and needs?

#2

What level of customer service does your company provide after implementation?

#3

If we provide remote access to employees, can we control or limit their access?

#4

What tracking features exist for mobile-enabled functionality in the system?

#5

What system integrations do you currently offer?

Consider Important Workforce Management Factors

Successful businesses rely on great employees. Those great employees depend on your organization to select and implement the systems that will support and enhance their work.

As you look for the right system to enhance workforce management in your organization, keep these factors and considerations in mind.



Factors <hr style="width: 50px; margin-left: 0;"/>	Considerations <hr style="width: 50px; margin-left: 0;"/>
End User	<p>Think about the people who will use the WFM system – leaders, administrators, managers and employees all have different system needs. You need to understand them and identify how the new system specifically meets their needs.</p> <p>Consider creating focus groups with end-users to gather their input and to their needs. This is the first step in an effective change management process.</p>
System levels	<p>Today's systems are highly configurable. Make sure you're considering what level of sophistication you require in your WFM system.</p> <p>For example, do you need basic time tracking or do you need a system that will allow you to add job and cost codes? What type of approvals and visibility do you require for employee scheduling?</p> <p>Make sure your future needs are part of the consideration – as your business evolves, you want your WFM system to grow with you.</p>

Factors	Considerations
Integration options	<p>Not all systems are created equal, and not every business has the same needs and strategies. There are wide-reaching WFM systems that cover many functions but don't excel in all of them. At the same time, patching together a system built on the best tool for every function can create an IT stack that is very difficult to manage.</p> <p>As you look at your options, use a "best-of-breed strategy" in which an ERP, accounting/payroll system or HCM, is at the center and can be supported by integrations that will extend the functionality.</p>
Cloud vs. on-premises solutions	<p>Depending on your operational model, you may benefit from workforce management software that is cloud-enabled, or you may require an on-premises solution.</p> <p>If employees require access to critical business systems while working remotely, a cloud solution is likely the best option. An on-premises or blended solution may be a better option for manufacturing or other organizations with employees who don't work remotely.</p> <p>Make this decision based on your current and possible operational needs which could arise in the future.</p>

Factors	Considerations
<p>Budget considerations</p>	<p>If you haven't had a WFM system in place, it's understandable you might be concerned about adding a new expense to your budget. Keep in mind that when you're leveling up your systems there are long-term benefits for both employees and the organization.</p> <p>As you look at the options, consider up-front costs, individual license costs, and additional training or customer service costs. Not every vendor has the same cost model, so make sure you evaluate each offering accordingly.</p> <p>Also, be sure to calculate how your WFM solution will save you money. Whether it's fewer payroll errors, improved job cost reporting, more efficient document management or faster schedule creation, you'll potentially reduce costs with a better WFM system in place.</p>

Not sure where to start?

Download our Scope of Work comparison tool to easily compare WFM solutions and their capabilities.

[▶ Check it Out](#)



Gather Input from Trusted Sources

As the saying goes, you don't know what you don't know. That's why it's essential to gather input from a variety of trusted sources as you consider various WFM system options. Once you have a list of your top choices, it's time to ask for feedback regarding your top vendors.

You can cover your bases with the resources listed on the next page.



Talk to your peers:



- Current and former colleagues
- Fellow members in professional organizations
- Industry groups on LinkedIn

Refer to software review sites:



- [G2](#): Discover and compare software options.
- [Capterra](#): Find software, compare options and read reviews.
- [Software Advice](#): Get one-on-one help and personalized recommendations about your software options.

Stay on top of trends:

As of 2021, many experts have cited the following workplace predictions that could influence your decisions about which WFM system is right for you:

- Remote work will continue.
- The need for biometrics and health screenings may increase.
- Location tracking and mobile access needs will remain steady.
- Employee desire for demand-based scheduling is increasing.

In the final stages of your decision-making, these trusted sources can provide objective insights from people in your industry. Based on the experience of actual users, you can get the answers you need to make a well-informed choice.

Attend industry conference sessions:

- [HR Technology Conference & Exposition](#):
- [Gartner ReimagineHR Conference](#)
- [SHRM Annual Conference](#)
- [APA Congress Annual Conference](#)



Conclusion

Within the world of work, there are multiple technology trends to consider and numerous system options available. Like other business leaders, you're dedicating valuable time and resources to assess and plan for the introduction of new technologies that will assist with crucial workforce processes.

As you weigh WFM options and make decisions, stay focused on your company's unique technology needs and capabilities. Involve a cross-functional team to assist with this decision and ensure it will benefit everyone across the business. As an organization, all members can unite to improve employee satisfaction, increase productivity and reduce compliance risks by maximizing all that a workforce management system has to offer.

