



# Workforce Management Software Buyer's Guide for Higher Ed

Your guide to making the best WFM  
choice for your institution



# Introduction

Workforce management (WFM) is an organizational method and approach that helps you maintain a productive workforce. It includes tools for scheduling student workers, tracking multiple jobs, managing diverse workforce such as faculty, salaried and hourly staff, and student employees. With cloud technology it's easy to access WFM tools regardless of location. Employees and administrators alike can login via mobile, web and in-person solutions. WFM also allows institutions to make decisions based on labor tracking and job costing, and to leverage document management capabilities to avoid risk. It's a key component of human resource management in higher education.

Thanks to technology, every industry – including higher ed – can now deploy workforce management software that supports the entire institution. Effective workforce management happens when higher education institutions integrate key WFM activities into one platform.



# Introduction cont'd

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

- Your institution is experiencing such growth or change that your current solution no longer meets your needs.
- The existing workforce management solutions don't support your diverse workforce, which creates extra work.
- Workforce systems and processes are fractured across various departments, creating duplication of efforts.
- Manual methods for managing labor hours and grant funding aren't efficient or effective.
- Your large student workforce is making scheduling and time tracking even more complicated.



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

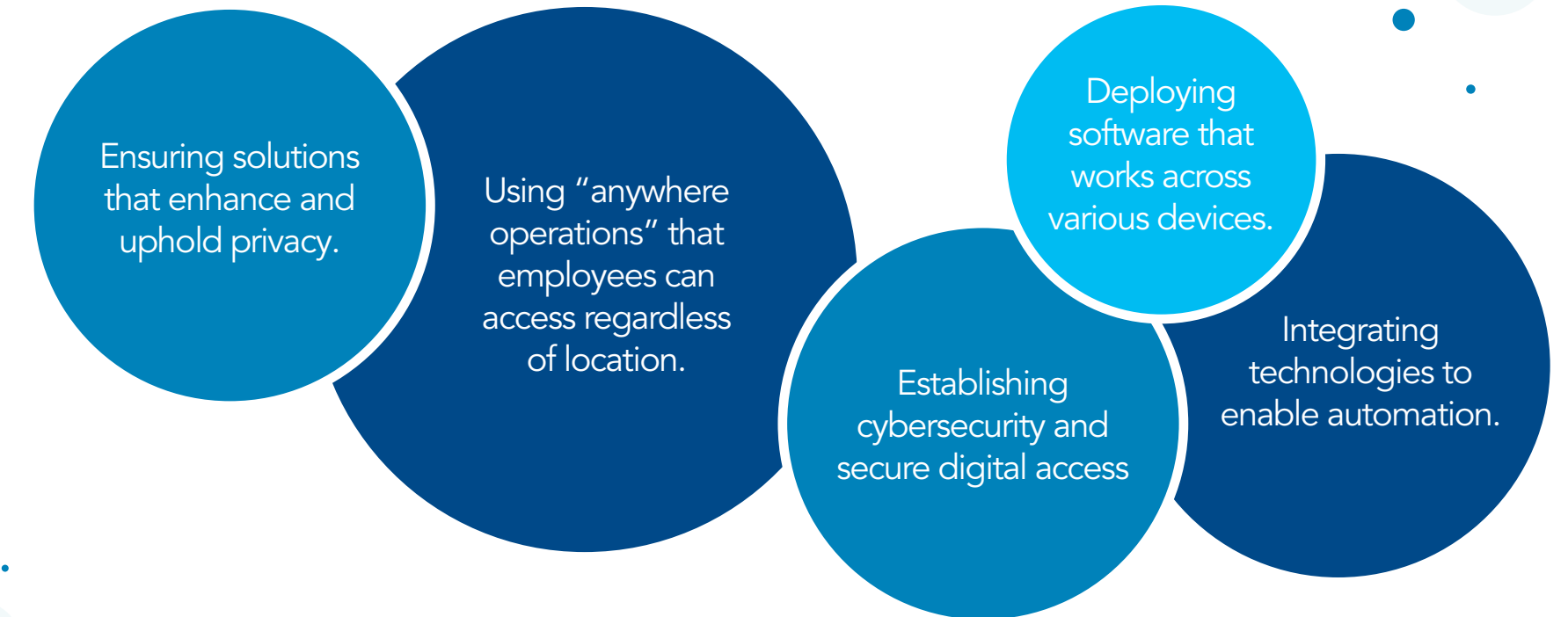
# Use Systems to Empower Workforce Management

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.”



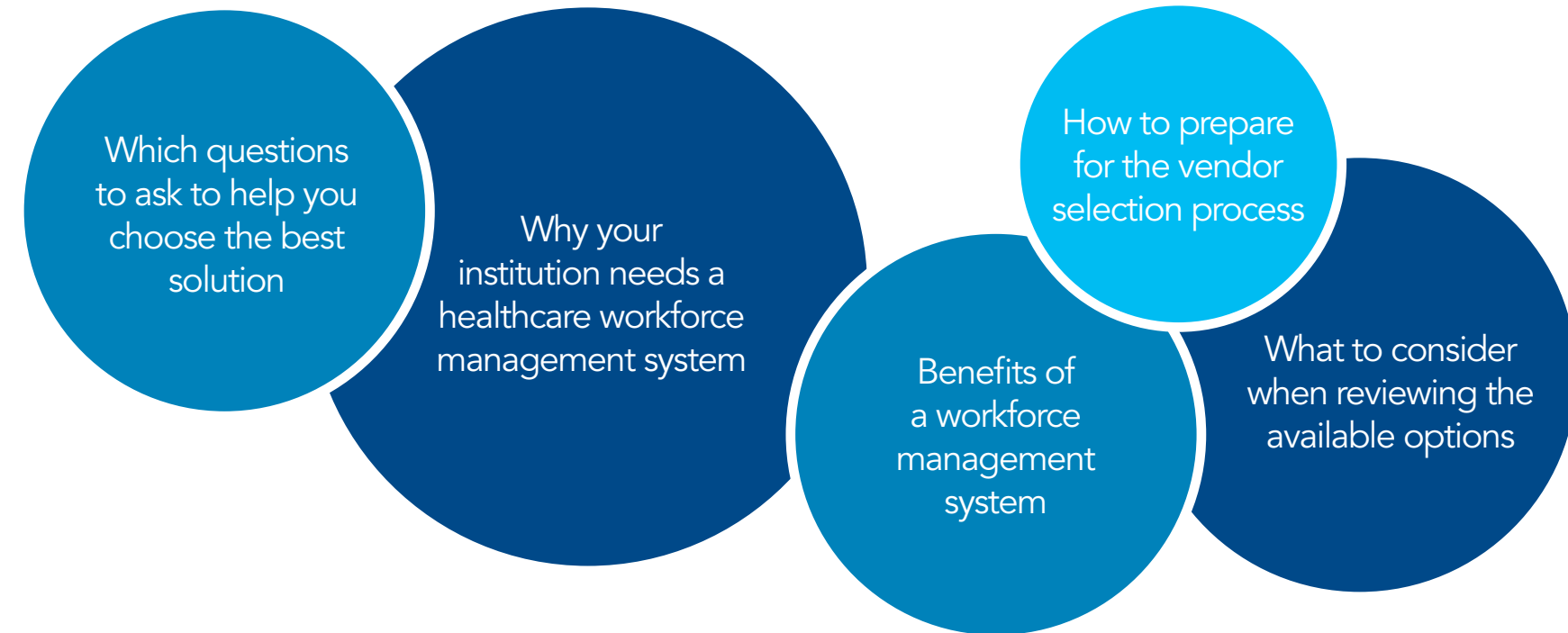
Gartner’s five key trends to address today’s workforce challenges:



You know that with new departments and employee roles, or an influx of regulations to follow, your higher education institution may have outgrown the current WFM approach. It may be time to update a specific department’s model, or you may be in need of a system-wide update. Regardless of the scope, updating your systems or implementing workforce management software can feel overwhelming for the first time.

As part of overall human resource management in higher education, it’s important to choose a solution that will meet existing and future needs. The complexity of the higher ed workforce adds a unique challenge. With a diverse set of staff, from campus police to maintenance staff and an ever-changing population of student workers, there are numerous needs to consider.

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



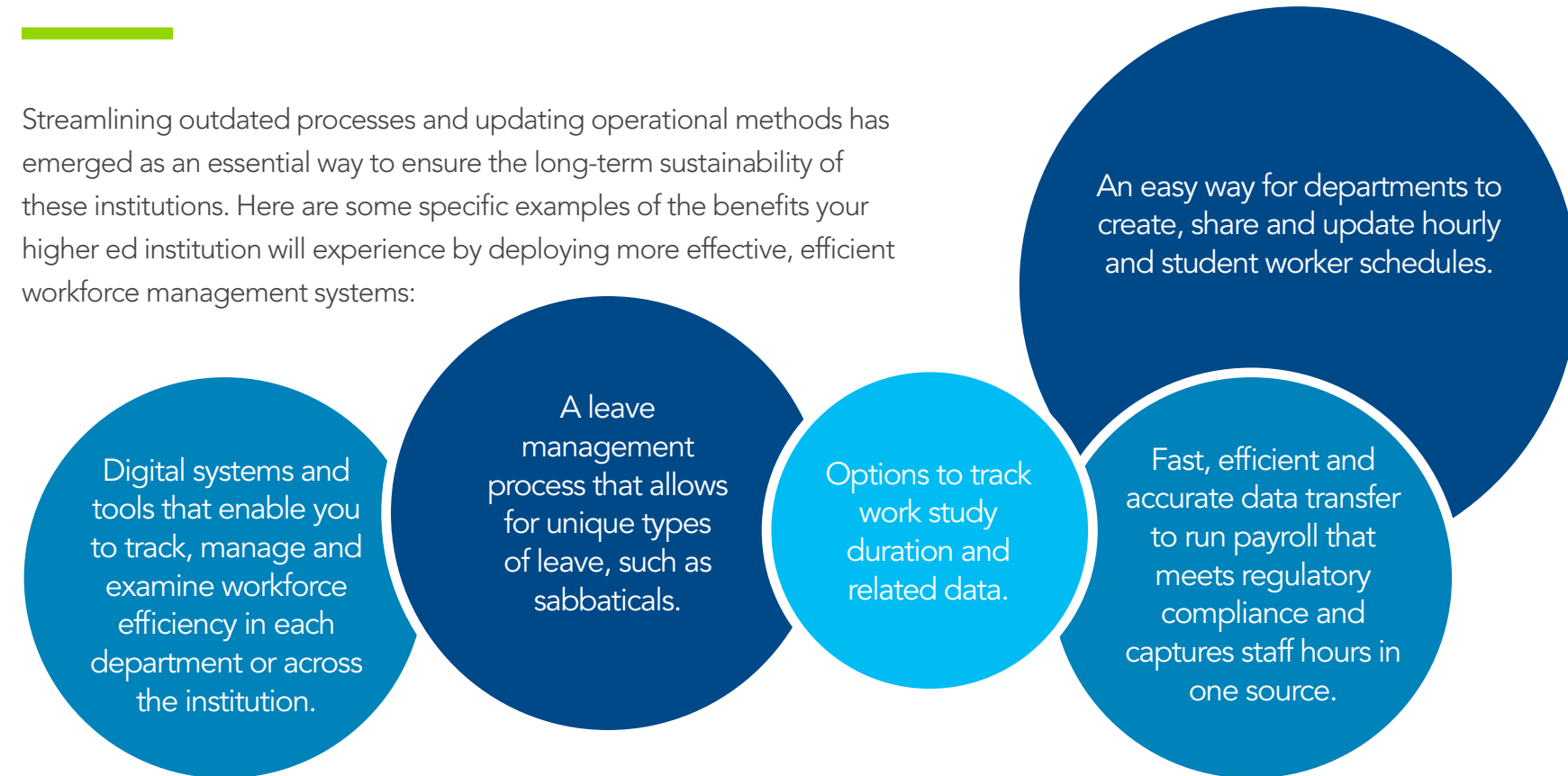
You don't need convincing that you need to find a better way. Leaders across higher education space are under extreme pressure to do more with less. According to [reports](#), "dozens of colleges and universities nationwide started 2020 already under financial stress. They'd spent the past decade grappling with declining enrollments and weakening support from state governments."

Amidst these difficult financial times, higher education institutions still need to ensure they deliver the experience students desire and expect. One survey of roughly 3,000 students found that "most students are openly questioning the ROI of a higher ed degree, with less than one in five (19 percent) students responding that the learning experience has been worth the cost of tuition."



# Benefits of Better Workforce Management cont'd

Streamlining outdated processes and updating operational methods has emerged as an essential way to ensure the long-term sustainability of these institutions. Here are some specific examples of the benefits your higher ed institution will experience by deploying more effective, efficient workforce management systems:



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 higher education institution.

# Why Your Institution Needs a WFM System

Effective higher education workforce management is an essential process that includes the activities required to maintain a productive workforce, including managing mobile or remote staff members, scheduling shifts, managing leave management and maintaining documents. Especially in an environment with varied staff arrangements and needs, you need a WFM approach that adapts to the unique staffing situations in the higher ed environment.

If workforce management is an entirely new undertaking for your institution, 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 staff empowerment.



## Improved productivity

In the simplest terms – productivity requires that you’re effectively managing your workforce. For an institution center to be successful, its providers and staff 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 staff, 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 staff productivity and organizational effectiveness through a system that enables effective time and attendance, leave management and document management. With the right tools, your healthcare leaders, managers and supervisors have access to the information they need to handle labor and scheduling, manage employee leaves and retain important documents.

## Empowered staff

Higher education 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 staff access to view the hours they've worked, their schedules, leave accruals and other personal information. It also provides healthcare employees with visibility into overtime hours, skill requirements for a shift and any differential pay based on hours.

Not only does 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 healthcare employers.

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



## Agile data models

Regardless of the size, educational institutions are complex environments that require agile operating models. A key element in agility are nimble organizational structures and management processes that allow you to align your administration and workforce around clear goals, metrics and key performance indicators. Cloud-based workforce management software makes this data agility and alignment possible. From any location, institution leaders and department heads can review data and create workforce strategies that enable institutional success.

The impact of these kinds of efficiency-creating agile models have on institutions can't be ignored. For example, [Emory University](#) saw benefits in streamlining grant award data so accountants could efficiently prepare Federal Financial Reports at the end of each grant. The previous process was cumbersome and required pulling information from multiple sources. With about 3,000 research grants a year reconciling numerous data without a tool was challenging.

"In terms of the quantitative and qualitative benefit for [efficiency creating projects], we've sensed improvement in satisfaction among the faculty and staff, we've seen improvement in ROI from a financial standpoint as well — most of that's gained from savings of wasted effort," [according to Emory's Chief Business Practices Improvement Officer.](#)



# Prepare to Request and Review Information from WFM Providers

Whether you're in a public higher education institution that requires a formal request for proposal process, or a private institution searching for a solution, you must carefully research and review what's available.

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.

- Articulate your healthcare 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 institution 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 Ellucian, Workday or Peoplesoft? Are there other payroll, enterprise resource planning (ERP) or human capital management (HCM) systems that require integration?
- #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)? Will all employees use the same access methods, or will it be based on facility assignments?
- #4** What level of detail do we need for labor tracking (e.g., shift differential, overtime, location-based codes, skill-level job codes)?
- #5** Can a solution help support our regulatory reporting, such as for PBJ compliance?
- #6** How do we anticipate employees will react to this change?
- #7** 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 institution of our size and needs?
- #2** What level of customer service does your company provide after implementation?
- #3** If we provide remote access to staff members, 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 higher ed institutions rely on great staff. Those great staff members depend on your institution to select and implement the systems that will support and enhance their work.

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



Factors	Considerations
End User	<p>Think about the people who will use the WFM system – administrators, department managers, staff members and student workers 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 staff scheduling?</p> <p>Make sure your future needs are part of the consideration – as your institution evolves, you want your WFM system to grow with you.</p>

Factors	Considerations
Integration options	<p>There are wide-reaching WFM systems that cover many functions but don't excel in all of them. Not all systems are created equal, and not every institution has the same needs and strategies. 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 institutional model, you may benefit from workforce management software that is cloud-enabled, or you may require an on-premises solution.</p> <p>If staff require access to critical systems while working remotely, a cloud solution is likely the best option. An on-premises or blended solution may be a better option for departments with staff 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><b>Budget considerations</b></p>	<p>If you haven't had a WFM system in place, it's understandable if you're 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 staff members and the institution.</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>

# 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.

At a minimum, make sure you cover your bases with these sources:



## Not sure where to start?

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

[Check it Out](#)



### 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:

- Increased attention to usage of grant funds to ensure higher ed equity.
- Remote work and online studies will continue.
- The need for on-campus biometrics and health screenings may increase to ensure staff and safety.
- Location tracking and mobile access needs for staff will remain steady.
- Staff member 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 higher ed. Based on the experience of actual users, you can get the answers you need to make a well-informed choice.

### Attend industry conference sessions:

- [Anthology Annual Conference](#)
- [NACUBO Annual Meeting](#)
- [Ellucian Live](#)
- [COUPA HR Annual Conference & Expo](#)



## Conclusion

Technology trends are impacting every aspect of higher education, including the numerous system options available to improve workforce management. Like other leaders in higher ed, you're dedicating valuable time and resources to assess and plan for the introduction of these technologies.

As you weigh WFM options and make decisions, stay focused on your institution's unique technology needs and capabilities. Involve a cross-departmental team to assist with this decision and ensure it will benefit everyone. As a higher education institution, you can unite to improve staff satisfaction, increase productivity and reduce compliance risks by maximizing all that a workforce management system has to offer.

