paylocity®
HR | Payroll | Time | Talent | Benefits

Buyer's Guide Checklist

What You Need to Make a Stress-Free HR and Payroll Switch

Keep this checklist handy to help you identify the best HR and payroll choice for your business.

When you're looking for a new solution, it's helpful to gather information before you meet with a vendor. Here's what we recommend to have on hand:

- Specific issues with your current provider
- Organization size
- Categories of employees in the workforce (hourly, salaried, independent contractors, etc.)

- Biggest compliance risks and challenges
- Upskill and reskill plans
- Budget

Assess Your Organization's Needs and Wishlist

Conduct a needs analysis and build a wishlist to identify the most critical features of your organization's next HR and payroll software, so you'll have a clear focus during the next step of the buying process. Reaching a consensus with your group of stakeholders ensures a smoother course of action.

☑ One platform that scales with you

☑ Proven, easy implementation

☑ Great service with short wait times

☑ Easy access to custom reports

☑ Easily process end-of-year tax statements

☑ Facilitate cultural connection

Consider the capabilities important to each stakeholder

HR

- Benefits administration
- Time and attendance
- Recruiting
- Onboarding
- Learning/training
- Regulatory compliance
- Insights and reporting
- Employee engagement
  - Social collaboration tools
  - Peer recognition capabilities
  - Custom employee surveys

Payroll

- Process automation
- Compliance
- Reporting

IT

- Deployment model
- Implementation
- Integration capabilities
- Performance
- Security

Finance

- Total expected costs
- Align with financial goals
- ROI tracking

Executives and Leaders

- Supports strategic goals
- Track record
- Ease of use

Compare Providers

Ask providers about:

Their experience with other businesses in your industry, or of your company size

How they practice what they preach and use their own product

How they innovate and plan to support your current and future needs

What the implementation process looks like

How they support clients, including call wait times

Which kinds of resources are available 24/7

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Do your research

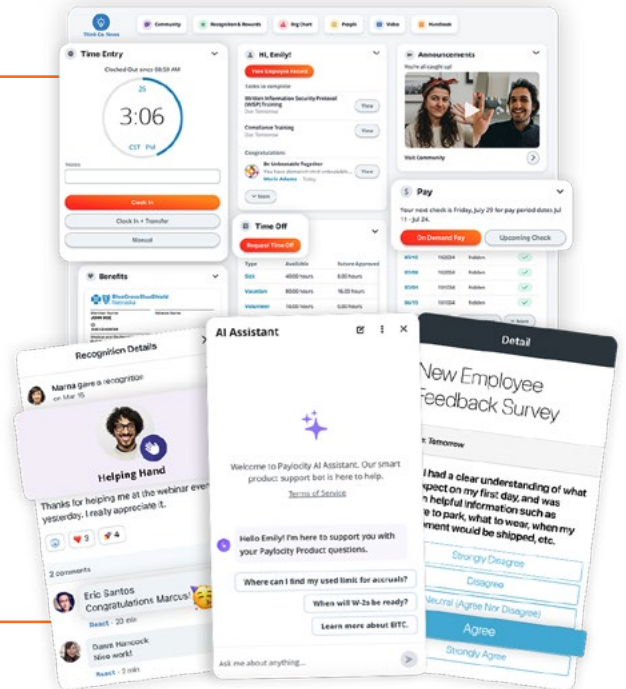**Don't take the provider's word for their services, listen to your peers:**

Verify the information on review sites like G2 where users submit feedback

Additional Resources

How Paylocity Can Help

As a leading provider of cloud-based HR and payroll software solutions, Paylocity can help your business make strategic HR decisions, while improving employee engagement and making your organization an even better place to work.

Get a guided tour of our solutions.

Simplify your HR and payroll software search with our buyer's guide.

Get the Guide

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Forward Together.