# workforce go!™

**PROSPECT COMPANY:**

**Contact Name:**

**Email:**

**Phone:**

## HUMAN CAPITAL MANAGEMENT

### Lead Qualifier Questionnaire

Workforce Go! partners, we have created this questionnaire to help you identify viable opportunities. You may find leads within your client base, or from other professional connections. Please note this is simply a preliminary assessment tool to find out if a business qualifies as a potential end-user. Should the organization advance past this phase in the sales pipe, a Workforce Go! sales representative will follow up with a discovery/needs requirements session.

### Questions to help qualify potential Workforce Go! clients

This questionnaire is organized to cover general system-related topics as well as the four Workforce Go! Human Capital Management pillars—Payroll, Time & Labor, HR and ACA (Affordable Care Act) that comprise the comprehensive solution, and may also be sold independently.

## ASSESSMENT OF OVERALL HUMAN CAPITAL MANAGEMENT SOLUTION USAGE & NEEDS

1. In which state(s) is your business located?

2. Does your company operate with multiple FEINs?     [  ] Yes     [  ] No

3. Which system(s) do you use today for Payroll/HR/Time & Labor Management (TLM)?

4. Why are you considering changing your Payroll/HR/TLM solution(s) at this point in time?

5. What are the three "must-have" features for your Payroll/HR/TLM system?

6. What are the top 3 frustrations with your Payroll/HR/TLM solution? How do they impact your processes &/or bottom line?

## PAYROLL

### Workforce Go! offers both in-house and outsourced payroll services.

1. How do you synchronize your payroll & HR/TLM systems? Describe any manual data entry required.

2. How do you work with your current payroll provider? For example: Do you call in employee hours for processing or do you process your own payroll then submit it?

3. What types of payroll-related reports are you looking to run with your new solution?

## TIME & LABOR MANAGEMENT

1. How many employees currently track time? How do they track time? (Do they use an online system, time cards, or other method?)

2. Are you interested in seeing how the mobile app work?    [  ] Yes    [  ] No

3. Briefly describe the manner in which your company approves or processes timesheets.

4. Do you have any special overtime rules or rounding rules?    [  ] Yes    [  ] No

5. Is it important for your HCM system to accommodate any or all of these functions/considerations? If so, which one(s)?

   [  ] Accruals    [  ] Job Costing    [  ] Scheduling    [  ] Exceptions/Points Tracking    [  ] Shift Differential
   [  ] Time Zones    [  ] Other:

## HUMAN RESOURCES

1. Which HR functionalities does your new system need to include?

   [  ] Applicant Tracking    [  ] Open Enrollment    [  ] Performance Reviews    [  ] Electronic Forms (i.e. I9s & withholding)
   [  ] Asset Management    [  ] Worker's Compensation Claims Management    [  ] Trainings/Certifications
   [  ] Other:

2. What types of files/forms do you want your employees to access and complete from within their employee self-service portal?

3. Are you interested in an HCM system with job posting capabilities as well as a self-service portal where candidates can submit contact information, attach a resume, et al?    [  ] Yes    [  ] No

4. Are you interested in leave of absence tracking?    [  ] Yes    [  ] No

5. Are you interested in learning more about our HR Compliance Library?    [  ] Yes    [  ] No

## AFFORDABLE CARE ACT (ACA) MODULE

1. Would you like to learn about the Workforce Go! ACA module?    [  ] Yes    [  ] No

**Thank you for taking the time to ask your clients and other contacts these qualifying questions. We hope they will find that Workforce Go! offers the right combination of applications for their Human Capital Management needs.**

Use this page for further notes.