

# Purchasing a Time and Attendance Automation System



## Find the perfect solution for your organization

Investing in a time and attendance management system is a big step toward boosting efficiency, ensuring accuracy, and staying compliant. Taking the time to thoroughly plan and evaluate your options will help you avoid roadblocks and confidently reach your destination – a system that meets your needs now and in the future. Use this checklist as your guide to a smooth and successful journey!

✓	1. Know Your Current Time and Attendance Landscape
	<b>Assemble a project team</b> with key stakeholders from different departments.
	<b>Hold a kickoff meeting</b> with your project team to get everyone on the same page.
	<b>Review your existing timekeeping processes</b> for all types of employees (hourly, salaried, remote, etc.).
	<b>Interview department heads and payroll staff</b> to understand their experiences and pain points.
	<b>Talk directly with hourly employees</b> to gather their feedback and identify desired features.
	<b>Document your current time and attendance processes</b> , highlighting problem areas.
	<b>Evaluate your current pay policies</b> for consistency and potential issues.
	<b>Identify any inconsistencies in pay policy application</b> across departments or locations.

✓	2. Define Your Goals
	<b>Set clear goals</b> for your time and attendance solution, considering corporate, technology, and process improvements.
	<b>Identify potential areas for direct cost savings</b> , such as reducing payroll errors, faster processing, and less unauthorized time off.
	<b>Identify potential areas for indirect cost savings</b> , such as redeploying payroll staff and better labor management.
	<b>Build a business case for automation</b> based on the expected return on investment.

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✓	3. Define Your System Requirements
	Determine your needs for <b>data collection methods</b> (time clock, mobile, web, etc.) for different employee types.
	Consider the desired level of <b>ease of use</b> for all employees and managers.
	Define your requirements for <b>data visibility and reporting</b> , including necessary reports and dashboards.
	Outline the <b>time and attendance software features you need</b> , such as pay rule application, exception management, and self-service.
	Determine your needs for <b>mobility</b> , such as mobile clock-in/out and manager approvals on the go.
	Identify desired <b>self-service capabilities</b> for employees and managers.
	Specify your <b>system integration requirements</b> with payroll, HR, and other business systems.
	Define your <b>security and data integrity requirements</b> .
	Determine the desired level of <b>configurability</b> for work rules and workflows.
	Consider the <b>ease of ownership</b> , including support, updates, and scalability.
	Think about your <b>future workforce management requirements</b> beyond just time and attendance

✓	4. Research Potential Vendors
	Conduct <b>online research</b> to identify potential vendors.
	Read <b>industry analyst reports</b> for objective insights.
	Consult <b>crowdsourced peer review websites</b> for unbiased user feedback.
	Attend <b>industry tradeshows and conferences</b> to talk to vendors and see product demonstrations.
	Consult <b>business colleagues and industry peers</b> for recommendations.
	Narrow down your <b>list</b> to the top three or four potential vendors.

✓	5. Evaluate Vendor Offerings
	Compare and contrast <b>solutions</b> based on your defined requirements.
	Determine whether vendors' solutions meet your <b>current and future needs</b> .
	Request <b>in-depth product demonstrations</b> .
	Evaluate <b>ease of use, workflows, security, and information display</b> during demos.
	Conduct <b>company background checks</b> on the vendors.
	Evaluate vendors' <b>service offerings</b> , including implementation, training, and support.
	Check <b>customer references</b> to validate vendor claims.
	Consider visiting <b>customer sites</b> if possible.

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✓	6. Select and Implement Your Solution
	Discuss your findings as a project team and arrive at a consensus.
	Select a vendor that best meets your needs and budget.
	Obtain necessary approvals and sign the agreement.
	Work with the vendor to develop a detailed implementation plan with timelines and responsibilities.
	Form an implementation team to work with the vendor.
	Ensure readiness by documenting policies, preparing data, and setting up the work area.
	Actively manage the implementation process, tracking progress and addressing issues.
	Conduct end-user training to drive adoption.
	Test and certify the system to ensure it meets your requirements.
	Go live with the new system, potentially using a phased rollout.
	Monitor the system after implementation and provide feedback.
	Ensure a smooth transition from the implementation team to the support team.