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Executive's Guide to HR and Payroll Software for Small Teams

Introduction

As an executive, especially at a small organization, your people rely on you to not only set business goals and drive growth but also to build a place where people feel they belong and feel motivated to reach the goals you set. Making sure all of that happens — not just one part or the other — is truly the key to success for small teams trying to thrive in the modern marketplace.

To get there, you need human resources and payroll technology that makes core day-to-day operations — like paying your people and measuring time — consistent and automatic so you and your teams can focus on building experiences that foster belonging, communicate a clear vision for the future, and support employees both inside and outside work. That's how you'll create the kind of standout environment that attracts and keeps the kinds of talented people who will make an impact and help you reach your business goals.

This eBook is packed with actionable insights on the wide-ranging responsibilities of HR, the challenges presented by the typical HR workload, and the strategic value that comprehensive technology can deliver. We'll also explore the three must-haves for a strong HR and payroll solution, and demonstrate how finding the right fit can drive both culture and operations with a single technology purchase. Finally, get actionable resources you can use to diagnose your specific HR challenges and evaluate potential vendors.

The HR Workload

You're probably used to hearing business cases for different solutions or tools all the time from different parts of your organization, so you may be surprised to know that HR likely needs support they're not asking for. If you have a dedicated resource for the function, the employee may have adapted long ago to inadequate software or processes to keep the lights on. If you don't, and are instead relying on someone in another role like an office manager to perform HR functions, they may not even know what to ask you for. That means if you want to put the kinds of people-centric company standards in place that will help you hang on to your best talent and thrive, it's beneficial to recognize the full scope of the workload HR is asked to take on.

This awareness will enable you to understand the business value of the function and the technology that supports it. When the modern workforce looks at HR, especially in small business settings, they see experts in diversity, equity, inclusion, and belonging; regulatory compliance; benefits; physical and mental wellbeing, payroll and financial wellness; career advising; and a host of other areas — you must arm the person you trust in that role with everything they need to succeed across that spectrum.

HR administration
Back-office tasks most commonly associated with HR

These are the tasks most executives associate by default with HR. Managing records, ensuring forms are submitted, monitoring regulatory compliance, administering benefits, and many more.

This is often where you can make targeted investments to free up time and give your HR teams more time to connect strategically to business initiatives.

Pay and time
Operational processes for paying employees, tracking hours, and paid time off (PTO)

HR is heavily involved even in these baseline operations, especially with small teams. Tapping into HR's expertise here can make a huge difference in making pay and time more competitive and unlocking new insights.

When you take the steps to automate core processes, you can shift your focus to taking action on deeper insights, such as calculating flight risk and fatigue to combat turnover.

Talent
Recruiting, onboarding, and retention

From an executive standpoint, all these efforts from HR translate into culture. Your talent strategy fuels and drives your employer brand.

This is the area where you need to harness your resources and all available data as strategically as possible because it will make a major difference in HR's impact on your business goals.

Giving HR the tools they need to manage these responsibilities will increase operational efficiency and engagement — but the benefits aren't limited to the team. HR professionals who are considered strategy experts are **three times more likely** to make it easy for leaders to tie people data to larger business goals.[1]

Drive Both Culture and Operations

The right HR and payroll technology provides advantages all across your organization that both build the sense of trust and belonging your people expect and deliver the kinds of operational efficiencies your more business-oriented stakeholders are looking to gain. To run a modern, competitive organization where people want to work, you can't think of people and work systems as mutually exclusive. To get there, you need an HR software partner that recognizes both business and people impacts and interaction points both inside and outside work. This is what's called the Life-work Journey, and it's critical to making your company stand out from the crowd so you can keep your top performers longer and attract the best new talent.

To the right, see how various milestones in the Life-work Journey can impact both your culture and your business operations.

78% of workers strongly believe their employer **is responsible for helping them become net better off** across both life and work.[2]

Moments in the Life-work Journey

CULTURAL IMPACT

It's Brenda's first day on the job, and you only get one first impression. Day one sets the tone for the type of workplace you provide, especially with regard to inclusion and belonging. Brenda shares her experience with family and friends —and your employer brand is on the line.

Brenda's been working hard for almost a full year and has requested an unexpected personal day. This is a chance to demonstrate your commitment (or lack thereof) to accommodating employee life-work priorities.

When Brenda's mother becomes ill, she needs to begin caring for her at home, which can strain the employee-employer relationship. Can she complete tasks just as easily when transitioning to working remotely? Are HR processes smooth and simple, or additional obstacles for Brenda to contend with during an already stressful time?

Brenda is taking a big career step, moving from an individual contributor to a leader. As a manager, she is a representative of your cultural values on a wider scale; this moment reveals whether or not she has the resources to succeed and continue to drive cultural growth.

FIRST DAY ON THE JOB

LAST-MINUTE PTO REQUEST

FAMILY MEDICAL EMERGENCY

PROMOTION TO MANAGER

OPERATIONAL IMPACT

Brenda's first day tests the robustness of your onboarding technology, document management, and HR availability for new-hire questions. She may be delighted if key documents are quick to find, or frustrated if she has to repeatedly bug HR for assistance with basic tasks.

This absence demands HR agility and simple, powerful tools to handle switching Brenda's shift and ensuring continuous operations even with limited resources.

Brenda's transition to a full-time remote employee places an unexpected demand on your technology to quickly adapt. She has had to move, which means a change of address and tax jurisdiction. Can your payroll adjust to accommodate relevant changes without interrupting accuracy?

A promotion for Brenda tests various aspects of your talent management technology. Is her role and title change processed quickly? Does the addition of direct reports bog down the team's efficiency with manual processes?

Select the Right Solution Fast

Ultimately, you've got a lot on your plate, so you need to quickly make a decision on the HR software that's right for you and keep moving your business goals forward. That's why to respect your time and the many hats you wear, we've broken things down into the three key areas of focus that will ensure you get what you need.

One experience

You need a solution that puts all your people information in a single database and presents it in ways that are easy to understand. This will ensure you can easily automate and transfer data across processes that depend on each other, like payroll and time, while enriching all your operational metrics with consistent processes. Your teams will know that all changes are reflected everywhere instead of questioning which version of the truth is correct.

Look for:

- Rules and calculations that automatically connect to one another, like overtime hours flowing into pay or certifications helping determine who's eligible for a shift

- Reports across multiple areas, like dashboards showing average hours, workforce composition, pay equity, and open headcount in one display

- Changes being applied everywhere at once

- An open platform that lets you integrate your other key tools and reference them in the same place you're managing people and operational processes

- End-to-end employee and manager self-service on any device

Clear guidance

Beyond serving up people data in one place, you need a solution that tells you why that data is important to your business and how you can help your people use it. Make sure the platform you choose has built-in, automatic guidance and recommendations that get delivered proactively. This ensures you have time to act before negative impacts on cost, risk, and employee experience occur.

Look for:

- Timely, proactive alerts on key areas like flight risk and employee fatigue that point you to contributing factors and options for action

- Flexible benchmarks that consider both what normal looks like for your organization and compare your results against those of similar companies

- Recommendations in the flow of day-to-day activities to streamline tasks and help people act with confidence

- Help analyzing your people's responses to understand their feelings objectively about key activities like hiring, survey evaluation, and performance so you can nurture positive experiences and keep a finger on the pulse of cultural standards

2

Ongoing partnership

At a small business, neither you nor the people you've assigned HR and payroll management duties to have the bandwidth to be dropped into a new solution and figure it out alone. Make sure the vendor you select is willing to be a partner for life, helping you succeed through every stage of implementation, training, and support with best practices, user adoption techniques, and advice that aligns your solution with your business goals and people.

Look for:

- A launch experience that starts you on the right foot with intuitive, collaborative tools; best practices from implementation experts; and an accelerated time-to-live that doesn't compromise on quality

- A clear transition plan from implementation to go-live with hands-on, tailored support and instruction as well as easy access to instructor-led or on-demand solution training

- A commitment to ongoing support and success efforts, including both proactive and rapid response support, continuous advisory services, trend-mapping exercises, and business reviews

- Anytime, anywhere access to a community of your peers using the solution, and additional consulting and advisory services as needed

- Cultural best practices and the opportunity to be recognized if you implement them successfully to further promote and accelerate your organization's growth

3

Conclusion

Connecting people and business shouldn't be hard, and shouldn't feel like another item among the many to-dos you're juggling. It should be a natural part of running your organization, woven into your goals, strategic direction, and day-to-day processes. Supporting your culture with the right technology is table stakes now — to keep growing and thriving, you need a true partner that is going to be in your corner with guidance and timely, actionable solutions.

Designed for small businesses where everyone wears multiple hats, our all-in-one HR solution guides and empowers your people to make their day-to-day easier. From HR and payroll to talent and time, we're the partner in your corner rooting for your success and giving you the tools, support, and time needed to focus on growth and make a difference.

Appendix

HR Software Worksheets for Small Business Leaders

Workload questions to ask HR

1. How do the administrative tasks you are typically assigned affect your overall workload?

   _____
   _____
   _____

2. How much of your time is spent ensuring employees are paid correctly each pay cycle?

   _____
   _____
   _____

3. How much of your time is spent addressing employee PTO requests?

   _____
   _____
   _____

4. Do you have access to the pay and time data you need to make decisions about workforce trends and talent?

   _____
   _____
   _____

5. What can be done to reduce time to hire when filling an open position or replacing an employee?

   _____
   _____

The Life-work Journey

1. Can employees easily access all relevant new hire documents on day one?

   _____
   _____
   _____

2. Do you get any complaints about processes getting in the way of employees trying to complete simple HR tasks?

   _____
   _____
   _____

3. How complex is it for employees to make significant life event changes (moving out of state, getting married, adding a new dependent) in our HR platform?

   _____
   _____
   _____

4. How severely are HR operations disrupted by a last-minute PTO request that requires a shift be filled?

   _____
   _____
   _____

5. If an employee had to go from full-time on-site to full-time remote work overnight, how quickly is our technology able to adapt to help this transition?

   _____
   _____
   _____

Appendix

HR Software Worksheets for Small Business Leaders

Vendor evaluation checklist

One experience

☐ Data that is connected and pooled in one place for simple reporting

☐ Easy integration with third-party vendors and applications

☐ Self-service for managers and employees, including on mobile devices

Guidance

☐ Proactive analytics to inform talent decisions

☐ Industry/peer benchmarking

☐ Help with analyzing both raw metrics and response data to improve the employee experience

Partnership

☐ Accelerated time-to-live support

☐ Ongoing customer success initiatives, including advisory and consulting services

☐ Access to a peer community for best practices and expert insights

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