

Seven key pitfalls to avoid when evaluating WFM software

An essential guide to choosing the best time and attendance, and scheduling software

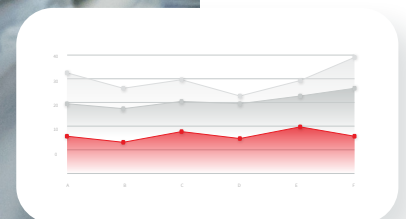


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How to use this guide

Workforce management (WFM) can span multiple parts of an organization, leveraging departments from human resources (HR) to information technology (IT) to finance.

This buyer's guide is built to help you avoid common pitfalls when selecting and assessing your current WFM solutions, whether that be time and attendance, scheduling, or a full suite.

Integrating HR, payroll, and scheduling systems is essential for managing complex operations and adapting to changing demands across industries.

When these systems work in harmony, they enable organizations to maintain appropriate staffing levels, ensure fair, equitable labor practices, and focus more resources on what matters most—driving business success.



Know your team: Preparing for workforce management software evaluation

Understanding your internal departments' needs is often an overlooked or undervalued step. By recognizing each department's requirements and their interactions, you'll conduct a more comprehensive evaluation, addressing team-specific needs and avoiding functionality gaps in your final software selection.

Key players typically involved

Finance

Cost control:

Tools for monitoring and controlling labor costs

Return on investment (ROI) and financial reporting:

Features that provide insights into return on investment and fiscal impact

Schedule optimization:

Ensuring efficient use of labor resources to maximize productivity and minimize costs

Operations

Real-time data access:

Access to up-to-date information for immediate decision-making

Workforce productivity:

Tools to monitor and enhance employee productivity and performance

Resource utilization:

Features that help optimize the use of labor and other resources to meet operational goals

IT

Software compatibility:

Ensuring the WFM solution integrates well with existing IT infrastructure

Data security:

Robust security features to protect sensitive employee and company data

Ease of implementation:

Simplified deployment and maintenance processes

Payroll

Integration with payroll systems:

Ensuring seamless data transfer between WFM and payroll systems

Process automation:

Automating payroll calculations and processing to reduce manual work and errors

Employee self-service:

Allowing employees to access and manage their own payroll information

HR

Time and attendance:

Ensuring accurate tracking of employee time and attendance

Data accuracy:

Ensuring reliable, precise HR data for compliant and skills-based scheduling

Compliance tracking:

Ensuring adherence to industry regulations and standards

Procurement

Vendor management:

Tools to manage relationships and performance of WFM vendors

Contract compliance:

Ensuring the solution adheres to contract terms and conditions

Cost-effectiveness:

Evaluating the total cost of ownership and potential savings

The psychology of buying: Roles within your organization

In selecting the right WFM software, it's crucial to understand the roles within your organization to progress effectively through the selection process. Think of your organization: Who aligns with the following roles in the purchasing process?



Initiators

These are the strategists who identify the need for a new product or service. They specify the problem and initiate the search for the best solutions, directing attention to what is required for optimal performance.



Purchasers

The procurement specialists manage the flow of goods, ensuring everything needed is procured efficiently. They manage contracts, ensure compliance with standards, and handle the financial aspects of procurement.



Influencers

Influencers offer expert advice on the most suitable actions. They possess deep understanding and technical know-how, swaying other members through their insights and expertise.



Users

End users are the ones who directly use the product or service. Their feedback is crucial for understanding practical needs and usability, influencing the final purchasing decision based on their hands-on experience.



Deciders

These individuals are typically executives who have the final say in approving or rejecting purchases. They consider recommendations and take ultimate responsibility for strategic moves and successful outcomes.



Gatekeepers

The information coordinators control the access and flow of information to the committee. They ensure that the right vendors and information reach the team members at the appropriate times.

Let's get started: Navigating workforce management software selection

Now that you have a clear understanding of your buying committee's roles, you're ready to navigate selecting the right WFM solution. This guide outlines seven common mistakes in choosing software for time and attendance, scheduling, and integrations, along with key vendor questions to help you avoid these pitfalls.

Use these insights to make informed decisions that address your organization's unique WFM challenges.



Time and attendance

Pitfall #1: Gaps in pay rules and overstated ease of integrations

Explained	Questions to ask
<p>Missing critical pay rule configurations: Ensuring your WFM solution can manage complex pay rules—such as overtime, shift differentials for night shifts, and on-call work—is essential. Ignoring this can lead to significant payroll errors, compliance issues, and dissatisfaction among employees, which can ripple across your organization.</p> <p>Overlooking integration complexities: Many solutions claim seamless integration with existing payroll and HR systems, but without thorough evaluation, you may find yourself dealing with data discrepancies and unnecessary manual work. These gaps can quickly translate into costly operational inefficiencies.</p>	<ul style="list-style-type: none"> • How does your system handle exceptions and configurable rules within the Time and Attendance module? • How does your system communicate with third-party systems, and how do you ensure a smooth and consistent experience across all platforms?



Did you know?

For every 1,000 employees, businesses experience an average of 1,139 payroll errors related to time, attendance, and expenses, costing them a staggering \$248,735 US. That's more than **one costly mistake per employee**.¹

¹ EY. Cost and risks due to payroll errors: Results of the 2022 HR Processing Risk and Cost Survey. December 2022.

Scheduling Pitfall #2: Missing the mark on dynamic scheduling and flexibility

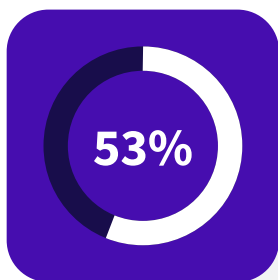
Explained	Questions to ask
<p>Overlooking employee preferences: Ignoring systems that factor in employee preferences and availability during the scheduling process can harm morale and increase turnover. Work-life balance is crucial, and your software should actively support its implementation by making it easier to align employee needs with business operations.</p> <p>Neglecting workforce flexibility: A lack of dynamic scheduling capabilities can disrupt operations. A robust WFM solution should ensure optimal staffing levels, quickly adapt to last-minute changes, and offer self-scheduling options. This not only empowers employees but also enhances satisfaction and reduces administrative tasks.</p>	<ul style="list-style-type: none">• How does your system incorporate employee scheduling preferences and availability?• How does your system adapt schedules in real time to sudden changes in demand or employee availability?



Compliance and management

Pitfall #3: Underestimating compliance and administrative complexities

Explained	Questions to ask
<p>Assuming compliance is built-in: One of the most common mistakes buyers make is assuming that WFM software will automatically stay compliant with constantly changing labor laws and regulations. This can lead to unexpected legal challenges, penalties, and disruptions, especially if the system lacks real-time compliance updates across different regions.</p> <p>Failing to account for downtime risks: Buyers often overlook the potential operational risks associated with planned or unplanned downtimes. Regular downtimes can severely impact productivity and create compliance gaps, especially in industries that operate around the clock. Ensuring the software minimizes downtime is essential for keeping operations smooth and compliant.</p>	<ul style="list-style-type: none"> • How does your system ensure real-time compliance with evolving local, regional, and international labor laws? • How does your system mitigate the risks of planned or unplanned downtime to ensure continuous operations?



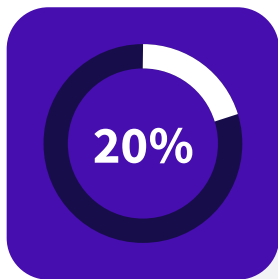
“53% of surveyed companies faced payroll penalties over the last five years due to non-compliance issues.”²

² HRReview. 50% of companies committed payroll errors during the last five years. February 2024.

Employee experience

Pitfall #4: Neglecting key features for employee satisfaction and productivity

Explained	Questions to ask
<p>Overlooking self-service capabilities: Without robust self-service features, employees are left dependent on managers for basic tasks such as viewing schedules, requesting time off, or accessing payroll information. This lack of autonomy can lead to frustration, lower engagement, and ultimately reduced productivity. Employees increasingly expect intuitive systems that empower them to manage these tasks independently.</p> <p>Disregarding centralized task management: Not using a unified platform for tasks like shift swaps and schedule requests can lead to inefficiencies and miscommunication. A centralized system not only simplifies scheduling but also enhances flexibility and engagement, contributing to a more motivated workforce.</p>	<ul style="list-style-type: none"> • What specific actions can employees take within the self-service portal? • Does your system provide a centralized location for employees to manage tasks such as shift swaps and schedule requests?



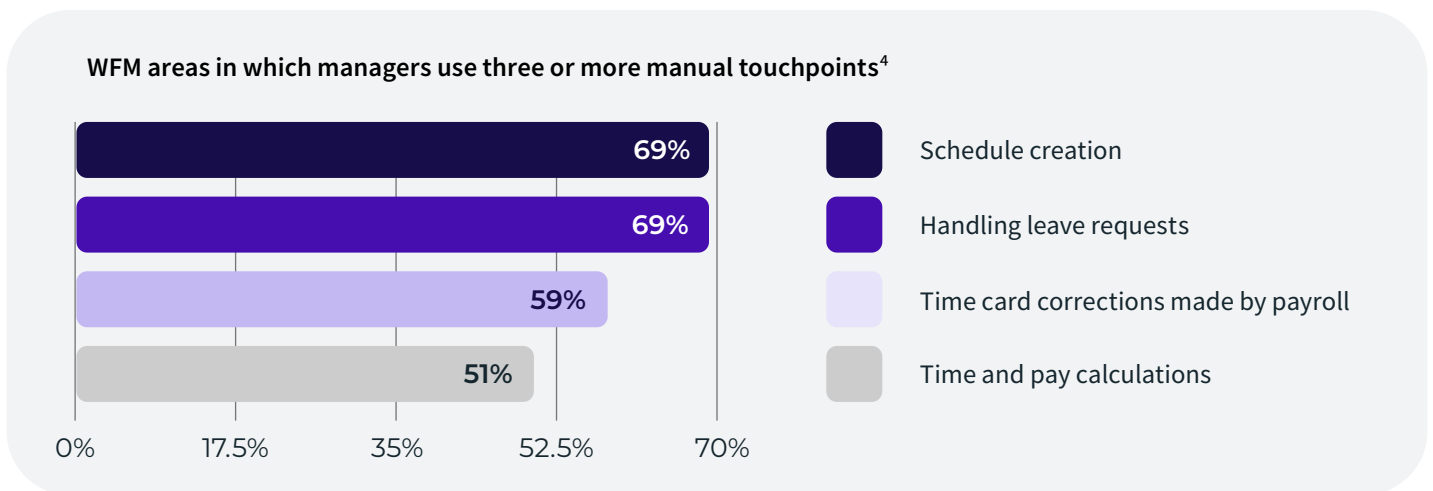
Employees who believe that their organization genuinely cares about their experience and well-being are four times as likely to feel motivated to work, and companies with happy employees outperform their competition by **20%**.³

³ Deloitte. The future of the frontline workforce. June 2024.

Extensibility

Pitfall #5: Getting fuzzy answers on data syncs and integrations

Explained	Questions to ask
<p>Unclear real-time data sync capabilities: Not having clear information on how the system handles real-time data synchronization can lead to operational inefficiencies. When data isn't synced properly, it results in delayed decision-making and outdated information, creating a ripple effect of misinformed choices.</p> <p>Ambiguity around integration complexity Buyers often encounter vague responses about how well the system integrates with existing technologies. Misjudging integration needs can lead to unexpected delays, increased costs, and limited scalability, especially as future technologies come into play.</p>	<ul style="list-style-type: none"> • How does your solution ensure real-time data synchronization across all integrated systems? • What application programming interfaces (APIs) and tools are available for custom integrations, and how does your system support them?



⁴Infor. Behind the curtains: Healthcare's quiet battle with burnout and technology lag. August 2024.

Planning for the future

Pitfall #6: Overlooking scalability and configuration needs

Explained

Neglecting dynamic scalability:

Many buyers don't fully consider whether their system can scale dynamically as their business grows. Fixed-capacity models can lead to performance bottlenecks during peak times or workforce expansion, which can hinder operational efficiency and require costly adjustments.

Underestimating the importance of easy configuration:

Buyers often overlook the need for systems that are easy to configure and adapt over time. Systems that lock you into a rigid setup or require extensive manual intervention for updates can limit flexibility, making it harder to take advantage of new features or adjust to business changes.



Did you know?

The rate of change affecting businesses has increased **183%** over the past four years meaning organizations need software that keeps up with the pace of innovation.⁵

⁵ Accenture. Businesses Anticipate Unprecedented Rate of Change in 2024, New Accenture 'Pulse of Change Index' Shows. January 2024.

Vendor tactics

Pitfall #7: Getting stuck with configurations that don't evolve

Explained	Questions to ask
<p>The Goldilocks Dilemma in solution selection: Choosing a WFM system that is either too generic or overly rigid can result in long-term frustrations. Generic solutions may lack the depth to handle specific needs, while rigid, over-customized systems can limit future flexibility. The key is to find a solution that offers the right balance—enough out-of-the-box functionality to get started, but adaptable enough to grow with your organization.</p> <p>Overlooking scalability in complex systems: Selecting a system that handles your current complexity but lacks scalability can create challenges down the road. As your organization grows, a system that doesn't evolve with you can lead to costly upgrades or even require a complete replacement.</p>	<ul style="list-style-type: none"> • Can you provide examples of how your system balances out-of-the-box functionality while meeting complex customer needs? • What features does your system offer to ensure agility in responding to changes like organizational growth?



Did you know?

66% of HR professionals believe current systems aren't fit for the modern workforce.⁶

⁶ Fosway Group. 2023-2024 HR Realities Research. February 2024.

The WFM buyer's checklist



Scheduling

- Dynamic shift scheduling
- Employee availability and preferences
- Shift billboard for open shift management
- Employee self-scheduling & shift swaps
- Real-time schedule adjustments
- Overtime and shift differential management
- Automated schedule notifications
- Reporting on scheduling efficiency



Time and attendance

- Complex pay rule handling
- Remote and offsite time tracking
- Biometric time clocks
- Timecard attestation
- Mobile clocking (Geo-fencing)
- Exception and custom rule management
- Integration with payroll systems
- Real-time attendance monitoring
- Compliance with labor laws



Staffing optimization

- Central staffing
- Real-time productivity tracking
- Skill-based staffing
- Emergency and on-call scheduling
- Open shift management
- Automated staff assignment



Integrations

- Integration with HR systems
- Payroll system compatibility
- API support for custom integrations
- Real-time data synchronization
- Compatibility with enterprise resource planning (ERP) systems



Compliance and security

- Ongoing labor law compliance
- EU General Data Regulation Protection (GDPR) and data protection compliance
- Role-based access control
- Data encryption and security audits
- Audit trails for compliance reporting
- Regular security updates



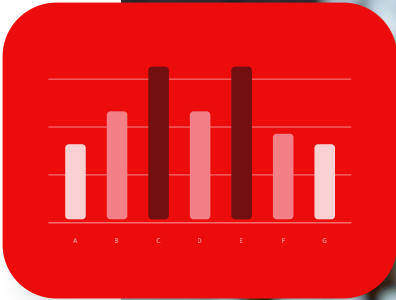
Employee experience

- Mobile self-service features
- Advanced reporting and analytics
- Artificial intelligence (AI)-powered insights
- Personalized staff interfaces
- Dedicated customer support team

Final steps: Ready to begin assessing your options

Congratulations! You're now equipped with the knowledge to avoid common pitfalls and make an informed decision when selecting your WFM software. By ensuring that each part of your WFM solution functions in harmony—from dynamic scheduling to seamless integrations and robust compliance—you're prepared to move forward with efficiency and precision.





About Infor

Infor is a global leader in business cloud software products for companies in industry-specific markets. Infor builds complete industry suites in the cloud and efficiently deploys technology that puts the user experience first, leverages data science, and integrates easily into existing systems. Over 67,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation.

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