

7 key pitfalls to avoid when evaluating WFM software

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

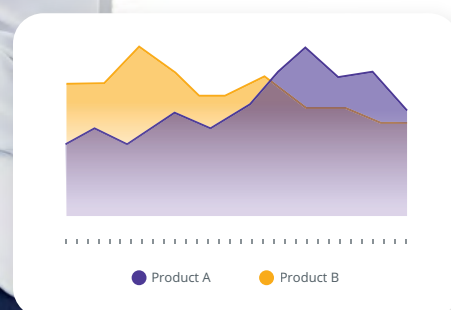


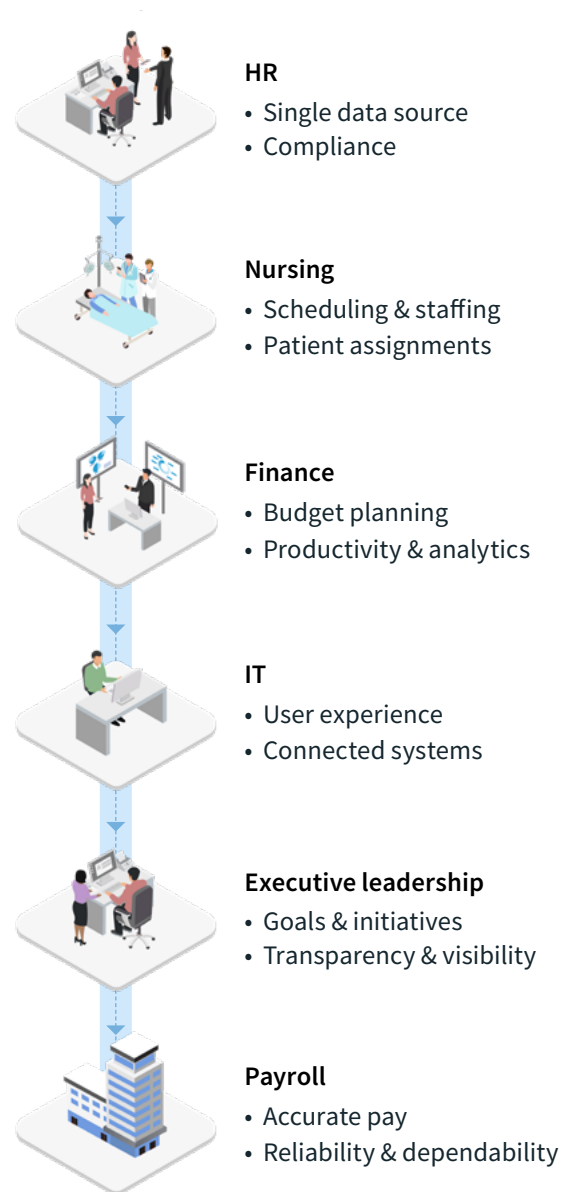
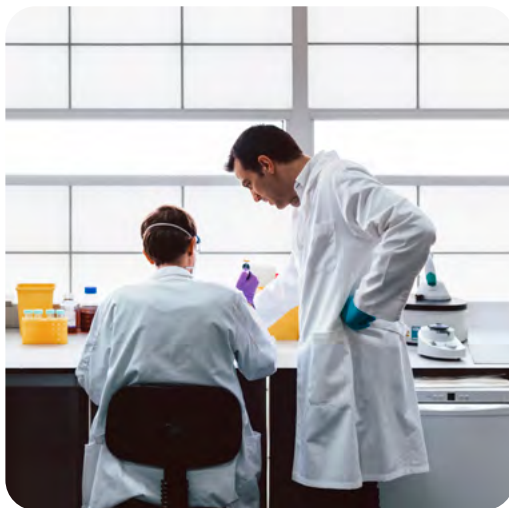
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How to use this guide

Workforce management spans multiple parts of a healthcare organization and leverages departments from Payroll to IT. This buyer's guide was built to help you avoid common pitfalls when selecting and assessing your current WFM solutions whether that be time & attendance, scheduling, or a full suite.

Integrating HR, payroll, and scheduling systems is crucial for healthcare providers in managing the complexities of 24/7 operations and fluctuating patient demands. When these systems work in harmony, they enable healthcare organizations to maintain appropriate staffing ratios, ensure fair, equitable labor practices, and focus more resources on what matters most: patient care.



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.

Here's a look at the key players typically involved in this process:

Finance

Cost control:

Tools for monitoring and controlling labor costs.

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 & attendance:**

Ensuring accurate tracking of employee time and attendance.

Data accuracy:

Ensuring reliable, precise HR data for compliant and skills-based scheduling. Engagement and minimize resistance.

Compliance tracking:

Ensuring adherence to healthcare 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.

Nursing**Staff scheduling:**

Tools to ensure optimal nurse staffing levels and shift coverage.

Patient care coordination:

Features that facilitate efficient patient care coordination and documentation.

Resource utilization:

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



The psychology of buying: Roles within your organization

In selecting the right workforce management 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

In healthcare, 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 have the final say, 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

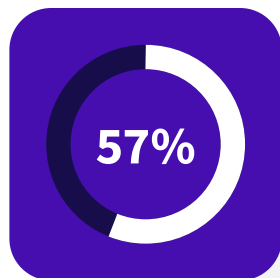
Now that you have a clear understanding of your buying committee's roles, you're ready to navigate selecting the right workforce management solution. This guide outlines seven common mistakes in choosing software for time & attendance, scheduling, and integrations, along with key vendor questions to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

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



Pitfall #1: Time & attendance

Explained	Questions to ask
<p>Overlooking complex pay rules: Overlooking the need for a system to handle complex pay rules such as overtime, shift differentials (especially for night shifts and weekend work), and holiday pay can lead to payroll errors.</p> <p>Underestimating integration needs: Failing to ensure that the Time & Attendance system integrates seamlessly with payroll and HR systems which can result in data discrepancies and additional manual work</p>	<ul style="list-style-type: none">• How does your system handle exceptions and custom rules within the Time & Attendance module?• How does your system communicate with third-party systems, and how do you ensure a seamless experience for users across multiple solutions?



57% of leaders report that time and attendance processes remain manual, leading to data discrepancies and the need for additional manual work when integration with payroll and HR systems is not seamless.¹

1. Battling healthcare burnout and tech lag with Infor WFM. (n.d.). Infor.

Pitfall #2: Scheduling

Explained	Questions to ask
<p>Ignoring employee preferences: Failing to consider systems that incorporate employee preferences and availability into the scheduling process can significantly affect morale and turnover, especially in high-stress healthcare environments. You know work-life balance is critical, software should help you implement it.</p> <p>Neglecting workforce flexibility: Overlooking dynamic scheduling capabilities can hinder healthcare operations. An effective system should maintain nurse-to-patient ratios, enable rapid emergency response, and offer self-scheduling. This empowers employees, boosts satisfaction, and reduces administrative burden.</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?



“We can trust them with children’s lives.
We can trust them with [their] schedule.”²

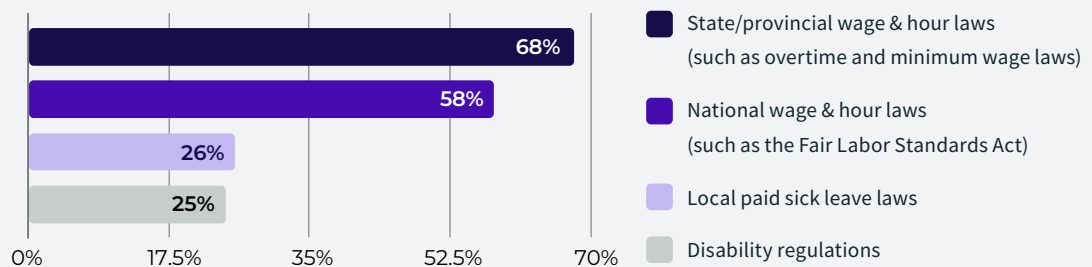
Gina Seekers
Director of HRIS Children’s of Alabama

2. Success in Creating a ‘Marketplace of Work’ at Children’s of Alabama. (n.d.). Infor.

Pitfall #3: Compliance & admin

Explained	Questions to ask
<p>Assuming automatic compliance: Assuming that the software automatically stays compliant with all relevant labor laws and healthcare regulations, which can change frequently. This oversight can lead to legal challenges, financial penalties, and compromised patient care standards.</p> <p>Overlooking integration depth: Not considering the depth of the integration capabilities with existing payroll systems and EHR systems, leading to manual workarounds and potential errors in data handling.</p>	<ul style="list-style-type: none"> • How does your system ensure ongoing compliance with both local and international labor laws and healthcare regulations (e.g., HIPAA, Joint Commission standards)? • Can you provide examples of how your system has integrated with similar payroll systems and EHR systems to ours?

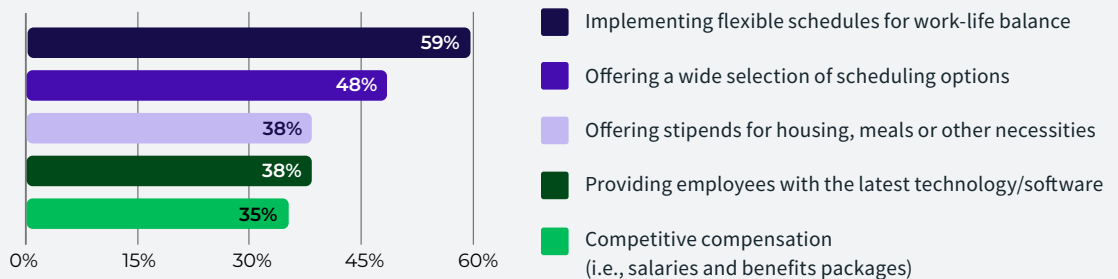
What types of labor compliance are most difficult for your organization to manage?



Pitfall #4: Employee experience

Explained	Questions to ask
<p>Neglecting comprehensive self-service features: Failing to provide a self-service portal where employees can perform essential tasks such as viewing schedules, requesting time off, and accessing payroll information can lead to frustration and decreased productivity.</p> <p>Lack of centralized task management: Absence of a unified platform for shift swaps, schedule requests, and tools like Shift Billboards can lead to inefficiencies and miscommunication. Centralized systems empower staff, improve scheduling flexibility, and boost employee engagement while reducing administrative burden.</p> <p>Ignoring efficiency and reliability in scheduling: Overlooking the need for configurable workflows and alerts that enhance the efficiency and reliability of employee interactions and scheduling can negatively impact staff morale and operational effectiveness.</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? • What features does your system have to improve employee interactions and scheduling efficiency?

What does your organization do to retain employees?

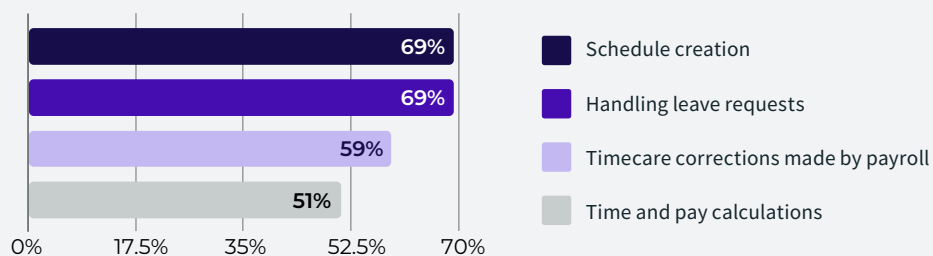


Battling healthcare burnout and tech lag with Infor WFM. (n.d.). Infor.

Pitfall #5: Integrations & extensibility

Explained	Questions to ask
<p>Ignoring real-time data sync: Not verifying the real-time data synchronization capabilities, which are crucial for accurate reporting and decision-making. Failure in this area can result in operational inefficiencies and decision-making based on outdated information.</p> <p>Underestimating integration complexity: Failing to account for comprehensive integration needs can lead to unexpected implementation delays and increased costs. For instance, inadequate integration between Time & Attendance and Electronic Health Records (EHR) systems may result in inaccurate labor cost allocation or compliance issues.</p> <p>Overlooking system extensibility: Your organization is evolving, and so will your needs. Consider a system's adaptability to your healthcare organization's unique challenges to ensure long-term value. The solution should evolve beyond basic integrations to address future operational requirements as your needs change.</p>	<ul style="list-style-type: none"> • How does your solution ensure real-time data synchronization across all integrated systems? • How does your solution handle the integration of new technologies or updates to existing ones? • What APIs and tools are available for custom integrations, and how does your system support them? • Bonus question: How do you handle data security and compliance during the integration process?

Workforce management areas in which managers use 3 or more manual touchpoints



Battling healthcare burnout and tech lag with Infor WFM. (n.d.). Infor.

Pitfall #6: Scalability & flexibility

Explained	Questions to ask
<p>Failing to plan for long-term workforce needs: Neglecting future workforce requirements can quickly render your system obsolete. Consider evolving labor laws, scheduling complexities, and healthcare market dynamics. Avoid the “we’ve always done it this way” mindset—it stifles innovation. Proactively refine your approach to ensure your workforce management solution remains effective and compliant as your organization grows.</p> <p>Relying on outdated approaches: Legacy features and processes in systems can impede operational efficiency in modern healthcare settings. Choose a solution that allows for easy removal or updating of unnecessary components. An agile system that adapts to current operational needs is essential for maintaining streamlined workforce management.</p>	<ul style="list-style-type: none"> • How does your solution support long-term workforce planning, considering changes in regulations such as minimum wage laws and schedule notifications? • How does your system support the regular assessment and updating of workforce management processes to align with modern healthcare practices?



Did you know?

66% of HR professionals believe current systems aren’t fit for the modern workforce³

3. Fosway Group. (2023). HR Realities 2023: Infographics Report. Fosway Group.

Pitfall #7: Configuration & complexity management

Explained	Questions to ask
<p>The Goldilocks Dilemma in solution selection: Avoid the pitfall of choosing workforce management systems that are either too generic or overly specialized. A one-size-fits-all approach often leads to functionality gaps, while excessively tailored solutions may limit future adaptability. Aim for a ‘just right’ balance—a system that meets current needs while providing customization options and future scalability.</p> <p>Ignoring scalability in complex systems: Choosing a system that handles current complexity but lacks scalability can lead to costly upgrades or replacements as your organization evolves. Consider future needs such as multi-location management, geographic expansion, and evolving security and data structure requirements. Invest in a solution that can grow with your healthcare organization.</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?



Minimizing administrative burden is critical for efficient healthcare operations, and a system that can finely tune to the specific complexities of the organization is essential to address these challenges effectively.

The workforce management buyer's checklist



Scheduling

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



Time & 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 healthcare labor laws
- ☐ Integration with Electronic Health Records (EHR) systems



Staffing optimization

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

**Compliance & security**

- ☐ Ongoing labor law compliance
- ☐ GDPR and data protection compliance
- ☐ Role-based access control
- ☐ Data encryption and security audits
- ☐ Audit trails for compliance reporting
- ☐ Regular security updates
- ☐ Fair scheduling

**Integrations**

- ☐ Integration with HR systems
- ☐ Payroll system compatibility
- ☐ API support for custom integrations
- ☐ Real-time data synchronization
- ☐ Compatibility with ERP systems

**Be sure to verify these capabilities**

- ☐ Mobile self-service features
- ☐ Advanced reporting & analytics
- ☐ AI-powered insights
- ☐ Personalized staff interfaces
- ☐ Dedicated customer support team



Equipped and ready: Time to explore your options

Congratulations! You're now equipped with the knowledge to avoid common pitfalls and make an informed decision when selecting your workforce management software. Just as every detail in a well-orchestrated system contributes to its overall success, you now have the tools to ensure each part of your WFM solution functions in harmony. From dynamic scheduling to seamless integrations, and robust compliance to AI-enhanced productivity, your organization is 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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