

A step-by-step guide for HR leaders and teams.

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# Assembling Your Team

The first step in any successful technology-selection process is assembling the right team. Whichever solution and partner you end up choosing, the technology you acquire will have to tick a lot of different boxes for a lot of different people. The best way of making sure that everyone's needs are met is to get all of the right people involved in the decision-making process from the start.

For starters, your team is going to need:

- ☐ A senior executive sponsor
- ☐ A defined-selection project leader
- ☐ Stakeholders from across the HR department
- ☐ Senior stakeholders with an understanding of the future direction of the business
- ☐ Stakeholders from every other department touched by the processes you want to transform

By finding people that fit into those groups and assembling them into a formalized acquisition team, you can see the full scope of exactly what your ideal human resource management system (HRMS) needs to do to meet all of their needs. Together, they'll enable you to see:

- ☐ Which areas of HR are in the most immediate need of modernizing
- ☐ Where inefficiencies exist that need to be eliminated by the chosen HRMS solution suite
- ☐ The key future business initiatives that any solution adopted will need to help you support
- ☐ What your users feel is missing from their current HR experiences, or areas where they feel the services you deliver are falling short of expectations

Those ultimately will be your reasons for acquiring the solution suite that you eventually settle on, and having solid, proven issues that need solving will prove invaluable when it comes to building a winning business case.



# Locking Down Your Technical Needs

The input provided by all of the groups represented in your team will enable you to build up a comprehensive list of every person and group's needs. But this is a technology purchase, and it's not just people's requirements that it needs to meet—there's also a handful of tech boxes to tick.

Ask yourself and your team these important questions upfront:

- ☐ How many users will the solution need to support? And how many countries will it be deployed across?
- ☐ Are those numbers likely to grow significantly in the future? And if so, can the solution scale alongside them?
- ☐ What other essential business apps does the solution need to integrate with and be able to talk to?

- ☐ Will the apps be able to run on all of the devices you need them to, and enable your people to access them from anywhere, at any time?
- ☐ Will disparate users from across your organization be able to connect to and use the solution effectively?
- ☐ Do you want to take advantage of new business intelligence (BI) and analytical capabilities? And if you do, what systems will the platform need to integrate with to easily access data for analysis?
- ☐ Do you want to improve collaboration between employees through social apps and help improve engagement through gamification?

When you pair your answers to those questions with the direct input of your team members, you'll soon build up a picture of exactly what you're looking for. The next step is getting the buy-in you need to go after it.





# Building Your Business Case

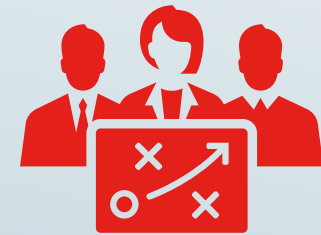
With your team built and your tech needs outlined, you're ready to start working on your business case for a new suite of cloud HCM tools. Creating a compelling and convincing business case is a critical part of the selection process, because it is your key to securing C-level buy-in and getting corporate sponsors on your side.

A good business case is exactly that: a case made for how a new solution will benefit the entire business. Don't fall into the trap of making all of your points and communicating in exclusively HR-based terms. The tools you are acquiring will benefit every single person in your business, and the case you make for acquisition needs to reflect that as fully as possible.

You need to think in terms of the things the C-suite really wants to hear. Focus on:

- ☐ How the solution will help the organization ensure it always has the right people, with the right skills, in the right jobs
- ☐ How it will help you reduce attrition and labor turnover, while increasing employee engagement and productivity
- ☐ How it will help the business compete more effectively and get more from its current workforce
- ☐ How it will support specific elements of the business's current and future strategy

All of those things, when demonstrated clearly, will help you build up a compelling business case. But, there's one thing that the C-suite really wants to see from you, and that's some cold, hard figures showing exactly the kind of financial return and value that the business is likely to see from this new investment.



# Forecasting ROI and Proving Your Investment's Worth

Nothing wins the support and buy-in of senior executives quite like a detailed and accurate ROI forecast. By demonstrating that you have considered exactly how your investment will impact the business's bottom line, you can make the decision to grant approval extremely simple.

**"The cloud ROI multiplier is driven by a number of factors, including lower initial and ongoing costs and the ability to deliver greater value over time without the cost and disruption traditionally associated with upgrading, expanding, or changing business applications."**

Nucleus Research report, "Cloud Delivers 2.1 Times More ROI." The full report is available for [download here](#).

When it comes to demonstrating the value of an HCM investment, you need to think about a wide variety of factors, such as:

- ☐ The reduced need for HR resources brought about by self-service, voice assistants, and artificial intelligence
- ☐ The cost savings associated with moving HR tech to the cloud
- ☐ Improved performance management and talent retention as a result of superior insights, fueled by new HR analytics
- ☐ Greater ability to identify and develop key skills within the business, rather than buying them in
- ☐ Increased efficiency, accuracy, and reliability of operations, and improved HR service delivery
- ☐ The cost savings that come from greater employee retention and lower workforce attrition

- ☐ How better workforce insight can help you predict workforce movements and improve planning, reducing the need for emergency hires or outsourcing

As highlighted in the Nucleus Research quote to the left, cloud ROI is determined by a wide range of different factors. So, when it comes to turning those things into actual numbers, you're probably going to need some outside assistance.

Finance experts and analysts from within your company may be able to help, but you may find that you need the help of third-party experts with specific experience of preparing ROI forecasts for these kinds of investments.

# Picking the Right Partner

Once you've secured your funding and executive buy-in, the real decision-making can begin. There will likely be a number of vendors in the marketplace that can meet your basic requirements as identified earlier, so how do you choose between them?

Your first task at this stage is creating a shortlist of potential HR software offerings that meet most of your general, agreed-upon requirements. Then, with those options outlined, you can start digging a little deeper to discover what it is that truly sets them apart from each other.

Here, you'll need to look beyond just a basic list of features and tools; you need to look at the entire service you'll receive with each potential deployment partner.

Ask yourself the following questions as you look into each option:

- ☐ What is each deployment partner's support offering like? Will you be able to get the assistance you need, when you need it?
- ☐ How will they make your transition to the cloud as simple and seamless as possible? And will they take care of all of the labor-intensive work such as cleaning up old processes and data, and putting new industry best practices in place?
- ☐ Do they provide training to help everyone get up to speed with the new tools, and start getting the most from them immediately?
- ☐ Will they help you migrate data from your current solutions and make the deployment process as simple as possible?
- ☐ Do they have a proven record of providing cloud services reliably, with the minimum levels of downtime?
- ☐ What kinds of other services do they provide? And could those complement your new HCM tools in the future?
- ☐ Is the vendor at the leading edge of cloud technology?



At this stage, most of the information you will have seen will have been prepared by the vendors themselves. It is still valuable, but to get a complete view of the solutions you've shortlisted, it's also worth adding an additional data source to complement that information and give you a fresh perspective on it.

Customer case studies, reviews, and feedback can be invaluable to you. Chances are, many businesses have been in your exact position before, and since adopting their solutions are now able to give you unique insight into how that solution helped them solve their challenges.

All of that should come together to give you a good idea of which vendor and which solution suite might be right for your business. Just to summarize, your final decision should be a product and partner that:

- ☐ Ticks all of the boxes you identified at the start of your purchasing project
- ☐ Is respected by major industry analysts
- ☐ Has been proven to help other businesses like yours succeed in similar situations and conditions
- ☐ Has a sustainable, lasting future ahead of it, in the hands of a partner you can trust





Therefore, it's important that you consider how you're going to effectively manage the change that your move to cloud HCM represents.

By following these steps, you can ensure that you make the right changes first time, and that the final stages of your journey toward cloud HCM are as well planned and considered as your first.

## Step One: Begin with Your Business Processes

Start by getting a grasp on process best practices, then work to align your existing processes with them. When you start planning those changes, you'll quickly identify areas where your current systems aren't up to scratch, and where things could be simplified or improved by the new tools you're deploying.



## Step Two: Advance with Accelerators

Leverage predefined solution approaches with accelerators and tools that minimize the impact of implementation activities on the business to get up and running with minimal disruption or risk of error.



## Step Three: Make Data a Priority

Prioritize data conversion and begin testing data loads as early as possible, because troubleshooting and resolving data issues at a later stage within upload templates can be extremely time-consuming and put the brakes on your deployment.



## Step Four:

### Governance and Rigor Are Still Necessary

HCM in the cloud allows acceleration of implementations and the pace of work can sometimes be intense, so it's extremely important to plan out exactly how you're going to maintain governance within your new, fast-paced processes.



## Step Five:

### Engage Superusers Early and Often

The best step to success is having key users involved in design and testing activities, because these users have credibility in the field and are critical to widespread adoption amongst the rest of your workforce.



## Step Six:

### Define Success Criteria up Front

Cloud capabilities only make sense if the business value is realized. Take the time to properly define what success looks like up front, and manage the project to deliver on those specific goals.



# Your Cloud HCM Acquisition Checklist

## A: Assemble Your Team

- ☐ Define a clear leader for your project.
- ☐ Ensure stakeholders from across the HR department are involved.
- ☐ Include people from outside of the department with visibility of the future strategic direction of the business.
- ☐ Get real users involved in the decision-making process and canvass their opinions on what's needed.

## B: Lock Down Your Technology Requirements

Answer the following questions:

- ☐ How many users will the solution need to support? And how many countries will it be deployed across?
- ☐ Are those numbers likely to grow significantly in the future? And if so, can the solution scale alongside them?
- ☐ What other essential business apps does the solution need to integrate with and be able to talk to?
- ☐ What devices do the chosen apps (or suite) need to run on for everyone in your business to get the most from them?

## C: Build and Make Your Business Case

- ☐ Identify key issues currently faced by the business that your project could help solve.
- ☐ Speak in broad terms about business benefits; don't just focus on the impact for HR itself.
- ☐ Look for areas where your project could save the business money.
- ☐ Work with finance experts to create a compelling ROI forecast that demonstrates what your proposed acquisition will do for the bottom line.





D:

## Start Looking at the Offerings in the Market

- ☐ Do some preliminary research and start drafting a shortlist of potential solutions that meet your outlined criteria.
- ☐ Look beyond the functionality of each suite and ask yourself the questions we identified in the “Picking the Right Partner” section.
- ☐ Assess each option on your shortlist based on what it can offer you today, how the partner adds value beyond the solution itself, and what the future of the platform could hold.

E:

## Complement What You’ve Learned About Each Option with Third-Party Research

- ☐ Find out what analysts have to say about the solutions you have shortlisted.
- ☐ Use case studies and reviews to see how others have put your shortlisted tools to work and solved challenges similar to your own.



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