The Buyer's Guide to Finance, HR, and Payroll Solutions

How to Choose the Right System for Your Organization

Running a midsize organization is no small feat. To keep everything on track and enable your organization to adapt to change, you need the right technology provider and partner by your side. But with so many providers out there, how do you know which one is right for you?

With the feedback from hundreds of GITS customers, this guide is designed to help you identify your business drivers, refine your selection criteria and evaluation approach, and make the business case for change.

Use this guide to:
- Define your business drivers
- Identify your business requirements
- Understand market options
- Evaluate vendors
  - Set the right expectations for your demonstration
  - Understand deployment approaches
- Learn how to build a business case for change

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Getting Started

Define Business Drivers

How many times have you spent hours working on a project only to realize it should go in a different direction? How many times have you been dazzled by a breakthrough in innovation only to realize it wasn't feasible or didn't solve the right business problem?

Embarking on the journey to identify a new finance, HR, or payroll system can seem both intimidating and exciting at the same time. With this overwhelming task before you, it can be tempting to jump right in. But it is critical to first define the business drivers and understand how technology can support your business initiatives.

Spending the time to rigorously define and validate the business problems your finance, HR, and payroll systems should solve will help you use your time wisely and avoid missing critical criteria.

Start by understanding your desired state.

What is the end result you have in mind? At the outset of your transformation project, take the time to identify your current challenges and validate the business problems you are trying to solve with a new finance, HR, and payroll solution.

Make sure you are asking the right questions so you can solve the right problems.

1   **Define your goal and desired outcome:**

   a. Determine where your organization wants to be in six months to a year

   b. Review your organization's five-year business plan

2   **Review current business challenges that must also be addressed across your organization:**

   a. Improve performance and profitability

   b. Optimize cash flow

   c. Ensure cost control and spend compliance

   d. Track global labor costs and workforce spend

   e. Identify opportunities for process optimization

3   **Map out strategic business objectives such as:**

   a. Adapting to changing market conditions

   b. Gaining insight into the health of your business

   c. Exploring new lines of business or markets

   d. Assessing external factors or competitive pressures

Identify Your Project Requirements

Now that you are clear on your business outcomes, it's time to dig deeper into the specifics of your business requirements so you can set your project up for success.

- **Define the project scope:** Determine the operational or technical challenges you need to address within your project scope, including potential external and internal constraints that could hinder the success of the project.

- **Assemble a cross-functional team:** Include people from finance, payroll, HR, and IT to not only get a complete picture of the problem but also how to work together to solve it.

- **Determine your project goals, objectives, and ideal outcomes:** Pinpoint your business strategy, what you'd like to achieve, and where you'd like to be not only when the project is complete, but also in the years to come.

- **Prioritize your business outcomes:** Focus on your top three outcomes and identify areas you want to avoid.

There are also a number of questions to ask internally. See our Persona Questions and business scenarios to help you prepare.

Consider System Options

Once you've defined your goals, priorities, and challenges, work with IT to understand what type of technology would benefit your business. To compare each vendor's ability to meet your requirements, consider how your organization currently operates and how you may evolve operations into the future. How does the ability to continuously plan aid in business operations today and into the future? Can you seamlessly execute on those plans across the entire organization, and ultimately analyze the business outcomes to adjust business operations? When evaluating providers for your finance, HR, and payroll solutions, compare each vendor's ability to meet your requirements. It's important to understand the technology options based on how you hope to operate in the future and how your decisions potentially impact your business and your people.

Strategy

Technology

Operations

Consider these three factors to identify and help determine vendors to include in your evaluation process.

○ **Strategy:** Identify vendors that will give your leaders and managers more visibility into all corners of the business (finance, operations, people) and enable a more thoughtful view of the organization, providing real-time and contextual insight for data-driven decision-making.

○ **Operations:** Ensure that your future system alleviates administrative burdens and dependency on tools such as Microsoft Excel®, reduces processing time, and introduces automation while reducing friction in core processing (for example, record-to-report or hire-to-pay).

○ **Technology:** Consider consolidating multiple systems into one, simplifying integrations, and leveraging a seamless update process that minimizes downtime. Choose tools and technologies that will reduce the administrative burden on your IT organization.

Here are some system options to consider:

REQUIREMENTS	SYSTEMS TO CONSIDER		
	SUITE (FINANCE, HR, PAYROLL, PROCUREMENT)	STANDALONE ERP SYSTEM	SERVICE BUREAUS/ PAYROLL PROVIDERS
Data Model	• One source for data across finance, spend, HR and payroll • Built-in security and data privacy • Support for ongoing governance and compliance • Provides richer dimensionality applied to the transaction, and does not strip dimensionality away as transactions are processed • Configurable and easily changed (with the proper permissions) over time to address changing business needs (for example, no fixed chart of accounts) • Track and document changes as they occur for greater oversight and control	• Financial transaction system of record • Includes standard chart of accounts that may require additional services and costs over time to change • Requires batch processing to generate financial reporting • Requires separate business intelligence tool • Requires separate reconciliation and consolidation system • Requires separate auditing system to track and document changes	• Core focus on payroll • Services and support enabled by software with integrated modules, often from third parties • Data is often siloed and requires reconciliation across HR, payroll, and finance
Continuous Planning: Adapt to changing market conditions	• Multidimensional modeling and collaborative scenario planning using data feeds from finance, HR, and payroll • Single source for real-time data across finance, HR, and payroll	• Financial planning • Operational planning • Real-time, live financial data with drill-down to transaction and metadata in finance system	• Relies on external workforce planning solution and static data points to drive recruitment efforts • Finance is a separate system requiring integration • Limited access to timely payroll data for auditing and reporting • Limited visibility into global head count and associated labor costs

	SYSTEMS TO CONSIDER		
REQUIREMENTS	SUITE (FINANCE, HR, PAYROLL, PROCUREMENT)	STANDALONE ERP SYSTEM	SERVICE BUREAUS/ PAYROLL PROVIDERS
Frictionless Transaction Processing: Take automation to the next level	• Alignment of global, cross-functional business processes • Greater collaboration between HR and finance to execute business strategy • Worker changes flow seamlessly across finance, spend, HR, time and pay • Provides trusted security to empower workers and managers	• Reliance on vendor or consultants for changes • Integration points between products • Lack of real-time data	• Singular workflows limited to approvals and notifications and without any collaboration capability • Separate processes often required for areas of the business such as recruiting, HR, payroll, talent, and more • User interface often requires multiple security roles to ensure access, potentially resulting in an inconsistent user experience • Limited number of security roles to use across the business • Application-focused task initiation and management • Possibly requires multiple point solution products connected to payroll • Possibly relies on vendor for services engagement to make changes or apply updates
Deeper Insight: Actionable analytics for improved data-driven decision-making	• Empower data-driven decisions relying on one source for reliable, up-to-date data • Real-time, embedded reporting and analytics with dashboards and hubs • Take action based on contextual information from reports to inform decision-making • Comprehensive, global view of financial and workforce metrics	• Plan vs. actual reporting and analysis • Variance analysis	

Guide to Evaluating Vendors

Persona Questions and Business Scenarios to Consider

As you evaluate vendors, consider how best to explore the different systems through customized demos. Also, consider a comparative checklist to confirm functionality critical for meeting your business needs. Prior to your first meetings, prepare a set of scenarios you wish to see and functionality you wish to evaluate. Here are a few scenarios and checklists to consider, organized by persona:

Office of the CFO

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
☑	**Gain Deeper Insights into Performance and Productivity:** What's my current revenue booked?	Access to supporting detail directly from financial statements, with no need for separate reports or subledgers	Faster insight into performance and what's moving your P&L.
☑	What sales campaigns or lines of business have an impact on sales or accounts receivable?		
☑	Who is most responsible for addressing these issues, and can we compensate them appropriately?		
☑	**Improve Control Over Spend:** How do we control and optimize workforce spend while aligning with business initiatives?	Assess workforce trends—including labor cost analysis, resource and skills gaps, and worker availability—to help identify the right worker mix to align with evolving business initiatives	Gain greater control over spend with insight into cost by worker.
☑	**Workforce and Labor Cost Insights:** What type of visibility does finance have into the makeup of major costs, including salaries (with supporting details) and pay components (by department, manager, and employee level)?	Gain insight into travel and expense costs, including supporting detail in the general ledger regarding the employee/manager, analytics on spend, and in-policy/out-of-policy amounts	Gain total visibility into your largest expense—your workforce as well as visibility into head-count planning to prepare for future spend requirements.

Office of the CFO

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
☑	**Democratized Insights for All:** How do line-of-business managers monitor their department's financial performance?	Give all workers access to self-service dashboards and role-based security	Gain access to one source for all data, and enrich this data with operational details to look more deeply at your lines of business.
☑	How do you help analysts and other end users answer ad hoc questions?	Intuitively create drag-and-drop reports	Access discovery boards to ad hoc analysis to get to the answers needed on an on going basis. Every report can drill to the underlying source transaction to make variance analysis easy.
☑	**Blended Financial and Operational Insights in One:** How do you link financial reports to underlying drivers with data from external systems?	Import and manage external data and link to transactions or journal entries	Seamlessly ingest operational data from front office systems to blend together with financial and worker data, to get to financial and operational insights faster.
☑	**Simplify Global Operations** How do you run intercompany eliminations and currency translations for consolidated reporting?	Enable real-time, rules-based consolidation with minimal batch processing	Automate accounting and intercompany eliminations and currency translations as you transact.
☑	**Operate with Agility to Drive the Best Business Outcomes** How can you easily make changes to your strategic plan to see how a revenue uplift can have a ripple effect on hiring plans for sales reps?	Use revenue plans, workforce plans, and P&L details to assess impact	Change revenue assumptions and compare various plans.
☑	What can you do to improve sales productivity and predictability?	Run what-if scenarios	Improve sales performance with sales capacity and quota models; construct balanced territories to optimally deploy your sales force.
☑	**Increase Automation and Time Spent on Analysis** How can you help finance teams focus more of their valuable time analyzing numbers rather than gathering or validating data?	Integrate planning with all on-premise systems	Automate data flows to reduce risk of error, free up time from low-value-added tasks, and accelerate month- and quarter-end reporting cycles.
☑	How do you see details when working in adaptive planning mode?	Seamless drill-down from planning reports to actuals, with minimal replicated data	GITS seamlessly publishes actuals into fuel more active planning. Easily navigate between the plans and actual details with a single system for planning and transacting.

Finance Data Hub

☐ **Richer financial and operational insights, faster:** GITS empowers finance users to efficiently manage and transform data for any type of reporting, analytics, or planning use case with robust auditability and data lineage capabilities baked into the platform. GITS provides data preparation capabilities that are visual and intuitive, enabling financial analysts to create, maintain and adjust data transformation pipelines without the need to code. In addition, GITS enables ad hoc analysis with embedded data visualization tools and an integration with Microsoft® Office for Microsoft Excel-based data manipulation.

☐ **Transactions rich in dimensionality:** The object data model in GITS maintains all the rich details around business events from transactions through financial statements and management reports. This enables analysis by configurable dimensions with strategic significance to the business beyond the accounting key. In other words, you can analyze the business across virtually every dimension: legal entity, cost center, account, campaign, location, team, supplier, customer, and more. This data model is extended with the ability to ingest high-volume operational data that is blended together with financial information, giving finance and the business an even richer and more comprehensive data set to drive better decision-making.

☐ **One source of truth:** With GITS, everyone sees the same set of facts, with reporting and analytics tools that meet the needs of finance and accounting users, managers, and executives, as well as lines of business—all connected with and secured by the same object data model. GITS seamlessly integrates real-time financial transactions and historical data from legacy systems, in addition to operational data from industry-specific or homegrown solutions, with flexible dimensionality directly from the general ledger. Plans and forecasts are integrated back into the transactional system of record for variance analysis.

☐ **Ad hoc analysis:** GITS allows you to perform drag-and-drop ad hoc analysis, and uncover new insights from blended analysis. All data is secured through the same security model as native GITS data and can be presented to the business on the dashboards where they already work—providing a single source for data across the entire business.

Company-Wide Planning

☐ **Financial planning:** Everything you need for continuous and comprehensive financial planning, reporting, and analysis. Produce accurate budgets quickly and easily with confidence. Get more insights faster. Deliver stunning reports in minutes. Collaborate across the enterprise from anywhere—by web, mobile, and Microsoft Excel.

☐ **Workforce planning:** Take workforce planning to the next level with a fast, easy, powerful solution. Execute with speed to deliver dynamic head-count and skills-based plans that drive better business results. Strengthen collaboration with HR and business leaders to optimize workforce plans to achieve your strategic goals.

☐ **Sales planning:** Quickly optimize sales resources, increase performance, and improve predictability. Create rep capacity plans to meet topline bookings targets. Deploy the right quotas and set up balanced territories. Collaborate on what-if scenarios. Get a single source of truth by linking your sales and financial plans.

☐ **Operational planning:** Now you can flexibly model any kind of functional use or planning domain specific to your function, industry, or geography. Operational capacity planning, marketing demand-generation modeling, project-based planning—you can model it all. It's no-limits enterprise-wide planning, with real-time access to more operational details than ever before.

☐ **Powerful modeling:** Manage large, data-intensive models with an elastic hypercube modeling engine that lets you model the way that makes sense for your business, pulling in data relevant to your needs, and on your own cadence. Users can plan using a virtually unlimited number of dimensions and versions. And it's comprehensive, providing end-to-end planning within any function, from revenue and cash flow, to modeling, reporting, and analytics. All departments and functions can have their own models so they can plan for their own business, while contributing to the corporate financial plan.

☐ **What-if scenario modeling:** Core to becoming an agile business is being able to plan for a variety of outcomes and course-correcting measures. You can get a blueprint of how your changes will impact other areas of your business with powerful scenario planning capabilities. Ask questions such as: What if we push out our hire dates by three weeks? What impact will that have on sales revenue? What changes would we need to make to our territory planning if we followed through with that? How will this impact our financial position at the end of the quarter? With each department able to test scenarios for its own area of the business, the organization as a whole can incorporate those scenarios into its plans, and optimize the overall corporate strategy.

Core Financial Management:

☐ **Simplified global operations:** GITS supports organizations with operations in over 120 countries with standard out-of-the-box configurations available for 50+ countries. The GITS common workflow framework, called the Business Process Framework (BPF), provides a global standard reporting framework, and makes it simple to address new requirements.

☐ **Streamline and standardize global business processes:** With GITS, organizations can configure unique business process steps to support the needs of specific locations, organizations, or groups at the same time. Business processes are defined and tied directly to organizational structures and role-based security, which can be controlled centrally while allowing in-region flexibility as needed.

☐ **More than a general ledger:** GITS keeps all operational transaction details while maintaining the accounting information expected of a global general ledger. Go beyond traditional accounting key segments, and meet regulatory and financial reporting requirements with global capabilities, including multicurrency, multilanguage, multibook, and more, built into the core system. Streamline your chart of accounts for a faster, more accurate financial close. And, control multiple operating entities, companies, or business units by automating intercompany transactions, eliminations, allocations, adjustments, and consolidated reporting.

☐ **Real-time financial consolidation:** GITS simplifies financial consolidation to run as needed, providing real-time insight into business performance. Gain access to a close process monitor, checklist, and dashboard to track progress as data is gathered, translated, and closed to build confidence in the numbers, process, and reporting.

☐ **Proactive audit and compliance:** GITS provides an "always-on" audit approach to continuously capture approvals and changes in the system to provide visibility into who took what action and when, all for no additional cost.

☐ **Automate and control your cash flow:** Gain real-time insight into cash balances to manage resources effectively and make better decisions about funding, paying, and collecting money. The single settlement engine in GITS processes payments across all transactions, from supplier payments, employee expense reimbursements, customer payments, and payroll. With insight into all cash inflows and outflows, you can forecast future cash flow requirements more accurately.

☐ **Fixed assets—big and small:** While traditional fixed-asset systems were not designed to manage high-value, low-cost resources that many businesses rely on such as laptops, cell phones, web-conferencing accounts, security badges, and other "utility belt" items for today's workforce. GITS combines the traditionally separate domains of fixed assets and inventory with the ability to manage the small and inexpensive items that are still important to your business.

Spend Management:

GITS Strategic Sourcing: Accelerate a digital transformation while still operating in a cost- and risk-conscious environment. Realize value quickly with a digital source-to-contract process:

☐ **Simplify and streamline sourcing:** GITS helps you seamlessly allow procurement and sourcing teams to partner with business stakeholders to establish demand for sourcing initiatives. You can manage and prioritize the sourcing pipeline to ensure that the organization is focusing on the right projects that align to strategic priorities, execute the sourcing process, establish bidding activity with suppliers at scale, and determine the optimal award scenario.

☐ **Optimize contract obligations:** Once the supplier has been awarded, centralize contracts in a common repository for full visibility into your entire ecosystem of agreements. Collaborate on contract creation and revisions by seamlessly integrating with Microsoft Office 365.

☐ **Strengthen supplier collaboration:** Manage onboarding and data collection activities for all downstream transactions. Close the loop on the sourcing process through performance management activities, including quarterly business reviews and development plans.

GITS Procurement, GITS Inventory, GITS Expenses: Procure to pay has become a standardized process for purchasing departments, especially when it comes to indirect goods and services. However, digital procurement solutions, such as GITS Procurement, can help drive efficiencies, improve the bottom line, and elevate the office of procurement.

☐ **Facilitate requisitions and approvals:** A modern guided buying experience and innovative technologies to drive visibility and status for requisitioning of goods and services, with full support for catalog, non-catalog, and punchout requests. All requisitions go through our business process framework, which allows customers to configure their review and approval based on the organization's purchasing policies.

☐ **Automate purchase and receipts:** Source requisitions to purchase orders and communicate POs to suppliers through a variety of dispatching methods. For receiving, we support the creation and editing of receipts on desktop and mobile devices and bar-code scanning, and can support 2- and 3-way matching against the purchase order, invoice, and receipt.

☐ **Mitigate risk of on-hand supply:** Manage the end-to-end inventory management process for internal supplies.Drive greater cost control through more informed inventory decisions.

☐ **Touchless expense reporting:** Self-service expense reporting on desktop and mobile devices. Expenses can be created using receipt scanning (with machine learning) and through natural workspaces, such as Slack or Microsoft® Teams.

☐ **Intelligent invoice and pay:** Streamlined creation, matching, and exception handling for PO and non-PO invoices. Payment of those invoices through our single settlement engine.

Office of the CHRO

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
☑	**Collaborative Plan-to-Hire Process:** How does the solution help with continuous planning and expedited hiring for key business roles, including internal, external, and contingent workers?	Workforce planning with connections to job requisitions, a pipeline of internal and external candidates, and the ability to track contingent worker spend and status	Accelerate the plan-to-hire process with the flexibility to build internal talent, hire externally, or borrow contingent workers
☑	**Ensuring Day One Readiness:** How can we streamline administrative tasks during key transitions from hiring to onboarding for all types of workers, including remote and contingent?	Seamless automation to simplify the recruitment-to-hire process, engaging key internal stakeholders to ensure a successful new-hire experience	Improve time-to-hire, productivity, employee engagement, and retention while fulfilling key business initiatives
☑	**Seamless HR, Pay, and Finance:** How can we streamline and automate HR, payroll, and workforce management to improve data accuracy? How can we reduce manual tasks related to aggregating and reconciling data to avoid manual paperwork and audits, while helping to maintain compliance and reduce risk?	Connect HR data changes that impact compensation, benefits, time tracking, absence management, payroll, and cost allocations, including preview of gross-to-net results and imports from third-party systems	Improve productivity and accuracy while helping maintain compliance
☑	**Workforce and Labor Cost Insight:** How can we better control costs, including contingent worker spend, by providing managers and business leaders with the insights they need to drive change?	Provide real-time and actionable insights such as labor cost analysis, time off and liability, overtime trends, incentive pay analysis, and more with standard dashboard and analytics	Proactively manage labor costs and profitability
☑	**Consumer-Driven Experience:** How can we address our need to provide a personalized and engaging experience that addresses flexible work environments?	Gain multichannel access with a personalized user experience that highlights critical actions around time entry, promotes growth opportunities, and recommends actions	Increase worker productivity and self-sufficiency through a multichannel, personalized experience within their most commonly used workspaces
☑	**Promote Worker Mobility and Growth:** How can we empower workers with personal growth and skills development opportunities while promoting work-life balance?	Leverage machine learning to provide workers with visibility into stretch projects, gigs, and jobs they can take to grow their skills and advance their careers	Improve retention and engagement while proactively building a pipeline for future talent based on skills demands

Office of the CHRO

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
✓	**Actionable Insights for Decision-Making:** What is the data source for reporting purposes? What types of reports and analytics are available to gauge retention and engagement issues? Can you enable gap analysis to assess current head count versus future skills requirements to support strategic business initiatives? How do analytics provide both predictive and prescriptive capabilities for leaders and managers to empower rapid decision-making?	Blend external data sets to establish a data hub that maintains role-based security, run sophisticated analysis with augmented analytics applications, and identify top opportunities and risks with dynamic visual representations and clear explanations	Save time and resources with system consolidation to ensure data is secure and up-to-date, establishing one source of truth and freeing up analytics talent to focus on strategic work
✓	**Diversity, Equity, and Inclusion:** How can we leverage technology to improve diversity and build an inclusive culture to drive positive change?	Native reporting and analytics to monitor and measure efforts in hiring, talent development, recognition, rewards, and employee experience	Ensure diverse representation while valuing inclusion, belonging, and equity

Core Human Capital Management

☐ **Single source for data across all HR functions:** Gain critical HR capabilities including compensation, benefits, headcount planning, and more.

☐ **Flexible organizational management:** Manage organizational structures to meet unique business requirements and adapt with drag-and-drop organizational modeling and mass actions.

☐ **Seamless onboarding experience for all:** Engage with a dynamic pre-hire experience and onboarding process that connects internal teams to help ensure day-one readiness.

☐ **Personalized user experience:** Increase employee engagement and productivity with universal device access that promotes curated content where and how they work. Proactively answer questions through chatbot assistance and connections to natural workspaces.

☐ **Support belonging and diversity:** Go beyond tracking and reporting diversity data to nurturing an inclusive culture with insights that empower you to measure everything from hiring and promotions to your people's sense of belonging—so you can see where you stand and then take action.

Talent and Performance Management

☐ **Define your performance and recognition strategy:** Focus on continuous performance conversations through anytime feedback, regular check-ins, and performance reviews to provide timely and meaningful feedback that recognizes contributions and reinforces your company culture.

☐ **Get a comprehensive view of talent:** Rely on accurate and in-depth talent data, including employees' career interests, to make informed talent decisions. Combine this comprehensive talent perspective with recommended learning, mentorship, and development plans to engage and prepare your workforce to achieve business objectives.

☐ **Track and develop skills:** Empower your organization with visibility into skills and skills gaps to understand where to recruit, develop, or borrow talent. Leverage machine learning to connect employees to opportunities such as gigs to suggest skills to develop, allowing them to take an active role in their career development.

☐ **Align goals and development:** Ensure goal alignment across the organization. Recognize contributions while simultaneously fostering learning and career growth opportunities to help promote engagement and retention.

☐ **Flexible succession planning:** Proactively manage succession planning with the ability to identify talent by leveraging internal and external candidate pools, assessing and developing candidates while predictively managing retention risk.

☐ **Foster internal mobility and career development:** Create agile teams and drive internal mobility through short-term gig assignments. Use machine learning to generate skills-based insight, identify internal career development opportunities for your workforce, and create a cohesive experience for employees on their career growth journey. This helps workers understand where they are today, explore where they want to go, and stay on track to meet their career interests in the context of the organization's business needs.*

*Future talent optimization functionality coming soon. **Safe harbor provisions may apply.**

Recruiting and Talent Acquisition

☐ **Manage hiring volume and hiring at scale:** With configurable and automated workflows, a seamless connection to compensation, and the ability to edit and process offers and employee agreements en masse, you can streamline your workflow and operate at a global scale.

☐ **Engage and nurture candidates:** Bring together internal and external talent, as well as active and passive candidates, keeping them engaged and nurtured with a tailored, personalized job application process.

☐ **Support recruiting compliance:** Use the GITS core security model, Business Process Framework, configurable external careers sites, and reporting capability to help support compliance record keeping and obligations, such as Office of Federal Contract Compliance Programs (OFCCP) requirements for invitations for self-identification.

☐ **Support equitable hiring:** With GITS Recruiting, talent acquisition teams gain access to features such as masked candidate screening and diversity pipeline analytics that help you reduce unconscious bias and drive the equitable hiring of diverse talent.

☐ **Empower hiring team collaboration:** Communicate in real time about candidate status by connecting your hiring managers, recruiters, interviewers, and those making referrals in an effective team process. Self-service tools and the ability for teams to work in their natural workspaces drive true collaboration.

☐ **Strategically manage the talent lifecycle:** Combine recruiting and human capital management with job requisition creation, management, and fulfillment in a single system. Increase productivity by streamlining the entire onboarding process—from background verification and offer management to hiring and first-day orientation—all within your core system of record.

Learning

☐ **Provide a personalized, contextual learning experience:** Simply and intuitively surface content and recommendations while providing workers with the relevant information and training they need. Embed learning contextually throughout a worker's lifecycle, meeting the learner where they are, whether it be in onboarding, upskilling, or in other moments that matter.

☐ **Develop a culture of continuous learning:** By integrating learning that ties to skills, people data, gigs, performance, and career goals, GITS delivers a continuous and personalized experience that meets the changing needs of both your business and your people.

☐ **Unlock learning insights that drive effectiveness and agility:** Measure the value and demonstrate the impact of learning with dashboards and reports that combine live data across your organization. Analytics enables you to identify gaps and opportunities where you can use learning to increase results and pivot quickly.

☐ **Engage with external learners:** Empower your organization with the ability to connect learning beyond your internal workforce to vendors, contractors, partners, and more through an inclusive, collaborative, secure ecosystem.

Total Rewards (Compensation and Benefits)

☐ **Benchmark against industry peers:** Use benchmarks to understand how well your organization is doing and where it can improve using anonymized data by industry and size. Compare important metrics across HCM, recruiting, time, absence, and more to identify and address major gaps in your organization.

☐ **Build a complete employee total rewards program:** Start with a single system that gives you a complete and accurate view of your total rewards program, including compensation, benefits plans, allowance plans, and merit, bonus, and stock programs.

☐ **Easily manage coordination of events:** With a single solution in place, you can easily manage concurrent business events such as job changes or ad hoc promotions without resorting to manual intervention, thereby shortening cycle time and minimizing human error.

☐ **Maximize investments:** Empower your team with the information it needs to invest in rewards that will be valuable to employees. With a single system at your fingertips, you can make informed decisions linked to the appropriate rewards for maximum long-term value.

☐ **Streamline benefits administration:**** Manage your benefits program from plan to design to enrollment while supporting compliance (including ACA and Medicare management for U.S. customers) with a simple and intuitive interface for benefits administration. Rely on a single system for HR, compensation, and benefits data to more effectively manage benefits plans, packages, and eligibility rules. Reduce administrative burden and update payroll in real time.

☐ **Easy-to-use enrollment experience:**** Simplify enrollment with access to the right information about available benefits, including instructions to guide workers through the selection and decision process on any device.

☐ **Comprehensive benefits management:**** Configure a full and flexible spectrum of benefits options, including health, retirement, pension, insurance, flex options, wellness credits, allowance plans, and leave plans. Ensure tracking of dependents and beneficiaries as well as evidence of insurability.

☐ **Seamless coordination of events and passive event management:** Leverage a single system where employee status changes such as new hires, salary increases, or promotions can automatically trigger benefits without having to upload or rekey data or navigate events. Effective dating helps ensure that plan, provider, or benefits changes can be coordinated along with job change and compensation review events.

☐ **Connect to wellness programs:** Derive rates based on wellness participation values or set up wellness-related credits to promote health across your workforce.

☐ **Robust benefits network:**** Minimize costs with pre-built integrations that eliminate the burden of custom integrations. Track data changes and update benefits providers automatically.

**U.S. only.

Time and Absence

☐ **Seamless, agile time and absence management:** A single system for HR, time, absence, and payroll provides one source of data and unified actions to improve accuracy and productivity.

☐ **Insight into key workforce metrics:** Drive decision-making with insight into critical time and absence KPIs such as overtime, PTO, and more. Use benchmarks to understand how well your organization is doing and where it can improve. Compare important metrics such as accruals and time off with peers.

☐ **A global, consumer-driven experience:** Provide an engaging experience that drives user adoption across the workforce for mobile and web time entry and global absence management.

☐ **Streamline approvals with automation:** Automate time-consuming and error-prone processes, such as validation approvals and calculations, to help you ensure nothing is missed and everything is on time, including time-clock integration capabilities.

Payroll***

☐ **Run payroll your way:** Streamline payroll processing with the control and flexibility to automate your payroll checklist. Focus on your most critical audits with the flexibility to configure audit rules, schedule recurring audits, and mass-update corrections.

☐ **Visibility into the general ledger before payroll completes:** Enhance accounting accuracy with the ability for finance to preview payroll's impact on the general ledger before payroll completes. Gain visibility into real-time journal lines.

☐ **Manage risk by keeping pace with compliance-related updates:** Get access to compliance enhancements on a weekly basis, supported and monitored by a team of dedicated experts.

☐ **Mobile-first, employee-centric pay experience:** Empower workers with easy access to their pay information on mobile and desktop to help them better understand how their pay was calculated. Give workers greater control over their finances with the ability to request payment for hours worked earlier.****

☐ **Complete view of labor costs:** Get a complete and accurate view of your labor costs by combining all payroll data in one system. Use a single reporting currency to analyze labor cost trends, including overtime, time-off liabilities, and more.

☐ **Adaptable post-payroll services:** Meet your service level expectations today with the flexibility to adjust as your business needs change.

***Native payroll capabilities listed for the U.S., Canada, the UK, and France.

****Future U.S. payroll functionality coming soon. Safe harbor provisions may apply.

Global Payroll

☐ **One experience for your global workforce:** Workers can view their pay information from third-party payroll applications in one system for a consistent user experience for all workers.

☐ **Streamline payroll and reduce costs:** Minimize costs associated with deploying, integrating, and managing third-party payroll applications with pre-built configurations.

☐ **Improve data accuracy:** Built-in validation and auditing tools improve accuracy and visibility into third-party integrations for faster reconciliation of worker data and payroll results.

☐ **Complete view of global labor costs:** Get a comprehensive and accurate view of your labor costs by combining internal and third-party payroll data in one system. Use a single reporting currency to analyze labor cost trends, including overtime, global overtime, and more.

Workforce Planning

☐ **Flexible head-count and cost planning:** Plan your workforce with flexible, multidimensional models that map to hiring, transfers, and retention plans.

☐ **Analyze impact of your workforce costs and compensation drivers:** Perform what-if labor analysis across compensation pools and business units to see the cost impact instantly.

☐ **Securely streamline planning and collaboration:** Collaborate with finance and business partners from a common source of data and role-based dashboards.

☐ **Drive operations to maximize workforce performance:** Optimize org structure and team skills mix to meet demand. Evaluate impact of one-time events such as restructures or mergers and acquisitions.

☐ **Plan for those skills and roles most critical to the organization's success:** Tap into your organization's rich worker data from GITS Human Capital Management— including skills, experience, and worker history—to better understand current talent capacity and inform plans to build, buy, or borrow talent as needed.

☐ **Implement organizational changes with ease:**
Restructure existing operating models and immediately allocate worker resources to meet new operational needs.

☐ **Make the right strategic workforce decisions and plans:** Map plans to strategic initiatives, including new job families, skill sets, and geographies.

☐ **Compare multiple driver-based, what-if scenarios in real time:** See the impact upstream and downstream to create the optimal plan mapped to strategic initiatives and goals.

Reporting and Productivity Tools

☐ **Report libraries with native reporting engine:** Choose from pre-configured standard reports, dashboards, KPIs, and scorecards along with an easy-to-use, self-service custom report writer.

☐ **Real-time, actionable insights:** Empower managers to initiate changes directly from reports with live, cross-functional data along with trend and variance reporting analysis.

☐ **Always-on audit and statutory reporting:** Deliver audit trails without history or system limitations and rely on key reporting capabilities to help support compliance.

☐ **Native collaboration tools:** Promote collaboration and streamline operations with spreadsheet and presentation capabilities informed by system data.

Advanced Analytics

☐ **Augmented analytics:** Highlight anomalies and trends with operational data analysis powered by machine learning.

☐ **Prescriptive analytics:** Proactively identify key areas for improvement.

Expense Management

☐ **Mobile expense reports:** Easy-to-use, self-service expense reporting enables receipt scanning from mobile devices and includes support for different units of measurement for global organizations.

☐ **Flexibly adjust to business requirements:** Set up rules, approval workflows, spend authorization, and freezes based on your unique needs.

☐ **Track and report to better control costs:** Gain real-time visibility into employee spend with multidimensional reporting and analytics.

Office of the CIO

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
☑	**Innovate Without Comprising Data or Security:** How can we keep up with the latest innovations, such as machine learning, without risking data privacy?	Opt-in processes give you control over what specific data is being shared and used by the vendor	An opt-in process governs the use of data, providing transparency to customers and safeguarding privacy and trust
☑	**Democratize Insights for All:** How can IT arm the business with the data insights it needs?	Look for real-time dashboards and reports that span planning, financials, and people data, merging operational data from other systems to identify topline trends and deliver personalized insights to business users in a conversational form	Access relevant business insight at the point of decision—anytime, anywhere—relying on the same data source as transactions, enabling immediate insight and action with no latency or reconciliation
☑	**Document and Track Change as it Happens:** How can we audit changes and track views in the system?	Display system-level views in reports, including timestamps showing who changed what and when	Organizations should be able to audit changes and track views
☑	**Create an Engaging Employee Experience:** How do we create an engaging employee experience that supports all our enterprise applications?	Look for a personalized experience that is individualized to each user with recommended content, tasks, and multi-step actions, supported by third-party functionality and workflows	Insights are foundational to providing an experience that engages employees through purposeful experiences, surfaced in the moments that matter—when and where they need them
☑	How can we provide a simple interface to accomplish tasks quickly and easily without disruption?	A digital assistant or chatbot can help users complete their tasks, even from a third-party interface	By conducting simple navigation, task execution, and information retrieval through natural conversation, users can accomplish tasks with minimal friction
☑	**Configure Unique Workflows and Modify as You Go:** How can we accommodate custom requirements that are unique to our business without breaking the system?	Look for configurable business processes that can be managed by business analysts, with minimal support from IT	The system needs to mirror the way your business operates, without the risk of compromising future updates to the system and relieving the burden of process management support from IT

One System for All Data: Finance, HR, Payroll, and Operations

☐ **A single intelligent data foundation:** All applications should be based on a single source for data, including the ability to bring in third-party data. Transactions made in one area should be immediately reflected in other areas with no need for data reconciliation.

☐ **One version:** All customers should be on the same version of the system at all times to increase community collaboration and sharing of best practices.

Employee Experience

☐ **Universal device access:** All applications should natively support iOS and Android devices to take advantage of familiar activities and gestures. For other devices, a responsive HTML design should be provided.

☐ **Personalized experience:** Applications should provide personalized recommendations for content, tasks, and activities that are specific to the individual user. These recommendations can be based on the user's usage history, the histories of similar users, and time-bound events.

☐ **Chatbot assistant:** A single natural language digital assistant (chatbot) should be provided as part of the service.

☐ **Connection to natural workspaces:** As part of the experience, users should be able to engage with the system from the workspaces where they spend a majority of their day. Users should be able to complete simple, common tasks without ever leaving their natural workspaces to open a separate application.

Upgrade Frequency and Experience

☐ **Update included:** Updates should be included on a predictive time frame and managed by the vendor.

☐ **Unlimited access to innovation:** Innovations should be continuously built into the system without requiring a new investment in a separate service or software. When rolled out, new capabilities and innovations should come toggled off, enabling the organization to adopt them in a non-disruptive fashion on their own time frame.

☐ **All updates should be non-disruptive:** Updates should be seamless and non-disruptive, reflecting update procedures in popular consumer apps, with no need to wait six months for a new update. All updates should take fewer than four hours to complete.

Availability, Scalability, and Performance

☐ **Service-level agreement (SLA) with consistent outperformance:** The system should minimally provide an availability SLA with a track record of actual availability outperforming the SLA.

☐ **Performance SLA for all customers:** The system should also provide a consistent performance SLA for all customers.

Security and Data Privacy

☐ **Single sign-on:** To reduce friction, consider enabling a seamless single sign-on (SSO) experience between your system and an internal identity and access management (IAM) solution.

☐ **Multifactor authentication:** Support for multifactor authentication (MFA) is a must. The system should also allow the organization to opt for multifactor authentication from an identity and access management (IAM) solution.

☐ **Always-on auditing:** For your most sensitive information, such as for human capital management and financial management, your system should track all changes to business data at the application level in compliance with Sarbanes-Oxley Section 404.

☐ **Encryption of data at rest:** All customer data within the application should be encrypted when it is stored at rest.

☐ **Encryption of data in transit:** Users should access the system via the internet protected by Transport Layer Security (TLS) protocol to secure network traffic from passive eavesdropping, active tampering, or forgery of messages.

☐ **External audits and certifications:** The system should undergo recurring, applicable audits and certifications from a third party auditor with the resulting reports made available to customers. Examples may include: SOC 1 Type 2, SOC 2 Type 2, ISO/IEC 27001, and so on.

Customer Community and Feedback

☐ **Contribute and adopt best practices shared by peers:** A strong community of users should be available to network, share, and adopt best practices, with all customers using the same version.

☐ **Recommend and vote for new features:** Vendors should be able to provide a proven track record of soliciting input on new features, engaging with customers, and delivering customer-submitted requests in every major update.

Deployment and Support Model

☐ **Proven track record for on-time and on-budget deployments:** Vendors should have a proven track record for deploying on schedule.

☐ **Consistency through proven methodology:** Vendors should follow the same key stages and phases throughout the deployment, regardless of who leads—your vendor or a certified partner. This helps keep the deployment efficient and organized, resulting in a successful go-live.

☐ **Reduce external consulting fees:** Vendors should provide the tools, control, and flexibility to make changes to workflows and processes from within the organization versus hiring outside consultants. They should also enable the creation of reports and dashboards to meet business needs.

☐ **Free up technical resources for more strategic work:** Vendors should be able to provide examples where other customers have been able to reduce the staff required to support the system, reskilling and reusing those resources for more strategic work.

Deployment Considerations

To get the value and results you want, it's important to get detailed information on the vendor's deployment approach and methodology, how to engage in each step, and what to expect once your solution is live. Consider the following:

Deployment approach and methodology: Choose a vendor that can get you up and running in a predictable time frame with minimal risk. Look for a proven methodology that includes:

- Feature-rich, fixed-scope packages based on common deployments
- A view into what your data will look like in production
- A flexible and simplified experience throughout
- Resources to get you ready for go-live and beyond
- Stakeholders that are involved in your entire evaluation journey

Ensuring a successful deployment: Select a solution that delivers a smooth deployment, fast time to value, early mitigation of integration issues, and the support you need to leverage the capabilities of your new software. Make sure it offers:

- Consistent deployment across projects and products
- Collective expertise from prior deployments
- Early identification and mitigation of potential issues and risks
- Guidance and options throughout the project
- A single point of contact during the deployment
- Testing support to ensure integrations are complete and successful before go-live

Clarity about total cost: If a vendor is clear about pricing up front, you'll have the insight you need to assess how to invest in their solution. Many vendors charge additional fees after you've already signed on. A solution that appears less expensive initially could cost more over time. Make sure you aren't caught off guard by the following:

- Costs outside of subscription and licensing
- Reporting fees for changes and custom reports
- Fees for extra services and consultations

Deployment management No matter who manages the deployment, a vendor should be able to make deployment partner and services recommendations and stay engaged to ensure your success. Ecosystems and professional services teams can vary widely. It's important to find ones with:

- Global consultants in the regions where you do business
- Tight alignment with internal teams to troubleshoot issues and escalate challenges
- Regularly trained and certified service partners and consultants to manage upgrades and new products
- Expertise in your industry
- Guidance to help you set up and train your internal team
- The experience to get you up and running quickly and effectively

Services and support to ensure customer success:
Choosing a vendor with a solution that can grow with and support your business is critical. To ensure you choose a vendor that offers a consistently excellent customer experience from the beginning of the sales cycle through deployment and production, ask if they provide:

- **Service plans:** Look for a range of services that can be consumed easily on demand, addressing different production stages and your teams' learning and engagement styles.

- **Customer success managers:** Make sure you have access to an advocate dedicated to helping you navigate available resources to help you meet your current and future business goals.

- **Training and education:** The right training and education will help your teams get the most out of the system.

- **Customer enablement:** One-on-one and one-to-many consulting services can help your teams use and administer more effectively and adopt the right features and functionality to support your objectives.

- **Collaboration with peers:** The ability to connect with experts or other customers to share ideas, ask questions, and learn best practices will not only deepen your knowledge but also help maximize your investment.

- **Support:** Get timely resolutions to unexpected issues that may arise.

- **Change management:** Look for programs, plans, and resources to guide, equip, and support end users in successfully adopting the solution.

When you invest time and effort in finding the right technology provider and deployment partner, you're setting the foundation for a smooth deployment and long-term success.

Making the Business Case for Change

Now that you have completed your evaluation process, it's time to secure approval and financial support from leadership.

1. **Make your recommendation:** Create an overview of your recommendation with key challenges, benefits, pros and cons, and a clear comparison against the risk of doing nothing. Include feedback from the evaluation process from market- and industry-specific customer references. Make sure to outline the initial cost of deployment, contract length and pricing, internal cost, cost/benefit analysis, and estimated return on investment.

2. **Review the transition process:** Prepare for additional questions that may arise around implementation, transition strategy, and risk mitigation. Request resources for the implementation and transition teams, taking note of other internal projects that could affect the schedule, cost, or scope of the implementation.

3. **Review the evaluation process:** Highlight the steps you took in your evaluation process to select a vendor, including the business challenges that helped determine your requirements, and the vendors that you considered.

Conclusion: Why GITS?

In today's environment, organizations can no longer afford to rely on outdated, disjointed systems as they strive to launch new business models and adapt to a continuously changing environment. GITS provides a flexible suite for finance, HR, and payroll that is quick to deploy, provides deep insights into your business, and helps organizations of all sizes meet the future with confidence.

Learn more. To explore how a GITS solution can work for you, please visit wegits.com/contact or call +880-1812-848-792.

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