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Today’s Presenters

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Agenda

• Why are We Here?
• What Do You Have Now?
• How to Evaluate
• Questions?
We’ve Done It Manually

Catalyst for Change

- Regulations like ACA (2010)
- Do more with less
- New hires expect technology
The Next Generation of Technology Buyers

• Organizations are planning for change
  – 42% plan to change HR tech in 2019
  – 86% replacing paper based processes
• 80% of HR Leaders have selected and implemented systems
  – Digital Natives
  – They know what they don’t want
  – They are wary of sales people
• HR Technology has a HUGE investor spotlight - $14 billion in 2017

RIGHT Technology, Set Up RIGHT

- Improves Efficiencies
- Automates Administration
- Limits Errors
- Removes redundancies
- Innovative to Keep Meeting Needs
- Saves Time and Money
- Saves Time and Money
What Do You Have Now?
Should You Evaluate Your Technology?

1. Is all your HR data in one system and easy to use?  
2. Can you run reports effectively and accurately?  
3. Is your employee life cycle paperless and automated (onboarding, benefits enrollment, cobra, etc.)?  
4. Are you confident in the accuracy of your data at ANY time?  
5. Are you happy with your technology customer service?

If you answered no to one of these, it may be time to take another look at the systems you are using.

Where’s the Opportunity?

• How many systems are you using?  
• What can we automate and/or integrate?  
• Are you already taking full advantage of your current system?  
• What is your total spend today?  
• Do you have the data, people, and budget to make a change or improvement to what you have now?
Lessons Learned

• There is not one superior system
• There is a system that’s right for your school
  – Customer service model
  – Reporting capabilities
  – HR support
  – Compliance support
  – Payroll support
  – Multi-state
  – Complex payroll
  – Annual 990 audits
  – Integration with required systems
  – Independent school experience

Key to Success – Internal Preparation

Success

(D) Dissatisfaction with status quo
(M) Vision of what is possible
(F) First Steps toward the vision

Failure

(R) Resistance to Change

Gleicher’s Formula: Scientific Approach to Change
Build a Supportive Team

How to Evaluate
Vendor Evaluation Overview

**Vendor 1st Demo**
- Austin coordinates 1st round Demos with 3 finalist based on recommendations. 4.5 hours

**Vendor 2nd Demo**
- Austin coordinates 2nd round Demos with 2 finalist as needed. 2 hours

**Vendor Proposals**
- Proposals submitted by 2 finalists. Austin coordinates proposal discussions. 4 hours

**Vendor Decision**
- Contract negotiations and vendor finalized. 1.5 hours

Set Yourself up for a Successful RFP

**Do**
- Evaluate your opportunities
- Define your budget and be prepared to share it
- Assemble the right team
- Select partners that understand Independent Schools
- Consider outsourcing the RFP process
- Limit vendors included in your RFP
- Celebrate your highs and acknowledge your lows

**Don’t**
- Don’t forget to do a cost analysis of your upgrade
- Don’t make assumptions
- Don’t prejudge technology and services – they are changing all the time
Questions?

Please contact us with any questions:
518-465-3591 or toll-free 800-863-0736
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The foregoing has been prepared as general information. It is not meant to provide legal advice with respect to any specific matter and should seek professional counsel where necessary. If you have any questions or require further information regarding these or other related matters, please contact Austin & Co., Inc.

Austin & Co., Inc.

• Employee-owned and established in 1853
• Represent over 110 independent schools and 70 charter schools
• Best Practices Agency since 1995 and a “Top Performer” in 2013
• United Benefits Advisors Partner Firm
• Elite broker status with national carriers
• Customizable solutions including: employee benefits, HR consulting, technology, and payroll
• Employer compliance guidance and support
• Dedicated Account Manager and employee advocacy
Vendor Selection Timeline

**Austin/Client Discovery**
- Austin meets with client for Discovery on technology needs. 1 hour

**Vendor Report Delivered**
- Austin delivers Vendor Selection Report with notes and vendor recommendations. 3 hours

**Vendor Discovery**
- Austin coordinates 2nd round Discovery calls with 4 vendors. 4 hours

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Once determination is made, see project timeline for implementation schedule
SHOULD TECHNOLOGY MAKE LIFE EASIER?

- Is ALL your HR data in one system and easy to use?
- Can you run reports effectively and accurately?
- Does technology automate your HR processes (i.e. onboarding, benefits enrollment, COBRA, etc.)?
- Are you confident in the accuracy of your data at ANY time?
- Are you happy with your technology customer service?

If you answered NO to any of these questions, contact Lisa Johnson for an evaluation of your system.

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