

## Buyer's Guide Checklist For a Stress-Free HR & Payroll Switch



Switching HR and payroll providers can feel overwhelming, but with the right approach, it can be a seamless and stress-free process. This checklist is designed to help you navigate the transition by identifying your company's needs, gathering key information, and ensuring alignment with stakeholders.

By following these **5 key steps**, you can confidently select a provider that enhances efficiency, compliance, and overall employee satisfaction.





## **Step 1: Gather Information**

**Collect and organize key details before evaluating new HR and payroll providers.**

- Current payroll provider:** \_\_\_\_\_
- Number of employees:** \_\_\_\_\_
- Pay frequency (weekly, bi-weekly, monthly):** \_\_\_\_\_
- Benefits offered (health, 401(k), etc.):** \_\_\_\_\_
- Compliance issues:** \_\_\_\_\_
- Major pain points with current provider:** \_\_\_\_\_



## Step 2: Assess Your Organization's Needs & Wishlist



**Determine what's most important for your company.**

- Automated payroll processing**
- Employee self-service portal**
- Compliance support and risk management**
- Integrated benefits administration**
- Time tracking and attendance**
- Custom reporting & analytics**
- Scalability for growth**
- Customer support availability**
- Other: \_\_\_\_\_**





## Step 3: Identify Key Stakeholder Priorities

Ensure alignment among leadership and employees.

- HR/Admin priorities: (e.g., ease of use, compliance)  
\_\_\_\_\_
- Finance priorities: (e.g., cost efficiency, reporting)  
\_\_\_\_\_
- Employees priorities: (e.g., mobile access, self-service)  
\_\_\_\_\_
- IT priorities: (e.g., system integration, security)  
\_\_\_\_\_
- Other key stakeholders: \_\_\_\_\_





## **Step 4: Evaluate Providers**

**Compare potential providers based on critical factors.**

- Pricing transparency and cost structure**
- Service and customer support quality**
- Software ease of use and accessibility**
- Compliance and regulatory support**
- Integration with existing systems**
- Scalability for future needs**
- Client reviews and testimonials**
- Other: \_\_\_\_\_**





## **Step 5: Plan the Transition**

**Ensure a smooth switch with a clear implementation plan.**

- Set a transition timeline: \_\_\_\_\_**
- Assign internal transition team members**
- Confirm data migration process**
- Schedule training for employees and administrators**
- Notify employees of changes**
- Establish post-implementation support plan**

**By following this checklist, you can confidently choose an HR & payroll provider that fits your business needs while minimizing disruptions.**





## Ready To Switch?

### Why Choose Merillat Consulting?

At Merillat Consulting, we understand that HR and payroll transitions can be challenging, but we're here to make it seamless. Our expert team provides customized solutions tailored to your company's needs, ensuring compliance, efficiency, and a hassle-free experience. With top-tier customer support, advanced technology, and a commitment to your success, we make switching providers an easy decision. Let us handle the details so you can focus on what truly matters—growing your business.

Contact us today to see how we can transform your HR & payroll experience!



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