

How to Switch HR Software the Easy Way



Switching HR software can feel scary. Between juggling multiple administrative tasks and carving out time for strategy, the thought of a complex implementation process can be enough to make you stick with an aggravating or incomplete system.

Sound familiar? Many HR professionals put off transitioning, even with a solid understanding of **the time and cost savings** they'd get from switching. They may even have a **dream HRIS** in mind already.

Whatever's holding you back from making an overdue change to how you do HR, this guide to switching software the easy way offers a clear, manageable path forward:

- **A step-by-step guide** to planning and executing a smooth software transition
- **Strategies** for minimizing disruptions and maximizing user adoption
- **Tips for selecting** the right vendor and ensuring a successful partnership
- **Clear expectations** to have for your new provider and for your internal team during the switch
- **Quotes from HR pros** sharing what a great implementation process looked like for them

You don't need to wait to make a change for the better. We hope this guide helps you get over those pre-implementation jitters and make the switch to a new provider without painful interruptions to your work or peace of mind.

“Best software sales and implementation process we have ever experienced. Everyone was transparent, efficient, knowledgeable, and personable. BambooHR® is incredibly intuitive and easy to use. By the far the smoothest software rollout we have ever done.”

KARENA CONRAD | CONTROLLER | METRIC | CANADA

Ditch Disconnected Systems Forever

BambooHR brings together best-in-class solutions, capabilities, and integrations in one platform, using a single source of data. It's time to simplify HR!

START SIMPLIFYING →

1. Assemble Your Internal Team

The first step to a smooth HR software transition is building the right internal team. This isn't just about assigning tasks—it's about creating a dedicated group with the skills and influence to champion the change and get others on board.

Consider including representatives from key departments, such as IT, **payroll**, and **benefits administration** in your implementation dream team. This ensures diverse perspectives are considered, but they'll also be your early adopters who can help the rest of your people embrace the new system, too.

At the heart of this team should be a designated point person, someone who'll own the implementation process from start to finish. Here's what to look for in the ideal person to lead the transition:

- **Seniority and Influence:** They should be respected within the organization and have the authority to make decisions and allocate resources, such as a mid-to-senior-level manager.
- **Organizational Savvy:** A deep understanding of your company's structure, processes, and culture is crucial. This helps navigate internal dynamics and ensure the new software aligns with existing workflows.
- **Project Management Skills:** Experience managing projects, even small ones, is invaluable. Look for someone organized, detail-oriented, and capable of keeping the project on track.
- **Communication Prowess:** Excellent communication skills are essential for keeping internal stakeholders informed, addressing concerns, and fostering buy-in. This person will also be the primary point of contact for the vendor and their implementation team.
- **Change Management Expertise:** Ideally, your lead will have some experience managing organizational change. They should be able to anticipate resistance, address concerns, and promote the benefits of the new system.

2. Request Implementation Checklists and Timelines

Now that you've gathered your internal implementation team, next is getting familiar with the vendor's implementation checklists, timelines, and other resources.

INTERNAL ACTION ITEMS TO EXPECT

To create a productive and positive partnership with your vendor, open communication and collaboration are essential. Be proactive in asking questions, sharing your concerns, and providing feedback. The vendor should be responsive to your needs and willing to work with you.

WHAT TO EXPECT FROM YOUR VENDOR

A quality vendor should be transparent about their implementation process and more than willing to provide what you need to succeed.

For example, at BambooHR, we believe the implementation experience should be collaborative and supportive. We provide a dedicated project manager upfront to guide each customer through the whole process. But that's not all we provide as a vendor to set the stage for a smooth transition.

“The worth that implementation with a dedicated project manager brings to a new client with BambooHR is invaluable. The amount of time, effort, and care each project manager puts in for each client is palpable in their experience. While there is work to be done on the client's side during the process, working hand in hand with their project manager will set them on the right path to be set free to do great work!”

JOEY KAELIN | IMPLEMENTATION MANAGER | BAMBOOHR

We also consider the following best practices as essential parts of our own tried-and-true implementation plan, which we believe every quality vendor should provide.

Implementation Plan Essentials	Why They're Important	How We Do It at BambooHR
Dedicated Project Manager	A dedicated project manager to guide you through the implementation process, answer your questions, and provide support.	A dedicated project manager works directly with the organization's internal project lead (or certain contacts on their implementation team) for the whole implementation timeframe, typically 4–6 weeks.
Implementation Checklists	Detailed checklists outlining the steps involved in the implementation process, including deadlines and responsibilities.	Our implementation process is divided into four phases, each with its own set of tasks and timelines.
Templates and Resources	Templates and resources to help you gather, organize, and migrate your data, configure your system, and train your employees.	We offer a variety of online resources, including help articles, tutorials, and interactive guides, to support you throughout the process and to help you bring leadership, managers, and employees smoothly on board the new system.
Regular Communication	Regular communication and updates from your project manager, keeping you informed of progress and addressing any challenges.	We provide weekly training calls to guide you through the software and answer your questions.
Flexible Scheduling	Flexibility to adjust the implementation timeline to meet your specific needs and priorities.	Your dedicated project manager can work with you to arrange your implementation schedule to prioritize your needs.
Continuing Support	Responsive, post-implementation support that remains committed to your ongoing success as a company and client.	After graduating from implementation, you can call, email, or live chat BambooHR's award-winning Support Heroes about any issues.

“The implementation process with BambooHR, and [my project manager] in particular, was an amazing experience. We tried to launch with another company before trying BambooHR and in one week made it further in the process than it took with the other company after 12 weeks!”

ALYSSA WHITE | DIRECTOR OF HUMAN RESOURCES | INQUIRING LITTLE MINDS | CANADA

“BambooHR only took six weeks to implement. I was dubious. I didn’t think it was going to take six weeks, but it did. And believe me, our data was in many different places, which is why we needed a system. I thought, ‘Oh gosh. This is gonna be really awful trying to bring everything together to load in.’ And no, it was fine. And the consultant who helped us was brilliant. Honestly, from start to finish, it was great. I can’t speak highly enough about BambooHR, so I’m definitely a cheerleader for the system.”

KRISTY MCDAID | PEOPLE SYSTEMS AND ANALYTICS LEAD | END. | UK

3. Create an Implementation Plan and Set Goals

Once you have your vendor’s implementation materials in hand, you can now map them to your own plans and goals.

The following checklist items will help you lay a strong foundation to build on during the entire implementation process:

- ✔ **Define Your Goals:** What do you hope to achieve with your new HR software? Improved efficiency? Enhanced employee experience? Better data analytics? Clearly articulated objectives will guide your vendor selection and implementation process.
- ✔ **Consider Your Existing Contracts:** When does your current agreement expire? Understand the terms and conditions, including any termination clauses, to avoid unexpected costs.
- ✔ **Map Out the Transition Timeline:** Identify key milestones, such as vendor selection, data migration, user training, and go-live. Be realistic about the time required for each phase and build in some buffer for unforeseen delays.
- ✔ **Prepare for Potential Disruptions:** A seamless transition is the goal, but some level of disruption is inevitable. Communicate openly with your employees about the upcoming changes and address any concerns proactively. Have a plan in place to handle any temporary service interruptions and ensure business continuity.
- ✔ **Document Everything:** Create a comprehensive implementation plan that outlines all aspects of the transition, including roles, responsibilities, timelines,

and contingency plans. A detailed implementation plan serves as a valuable reference throughout the process and helps ensure everyone is on the same page.

Doing this preliminary research and footwork sets appropriate expectations for how much work your team will need to do to ensure a **seamless transition**, versus what will be the vendor’s responsibility.

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4. Migrate Your Data

This part of the implementation process may be the prime reason people put off switching software, and large companies may feel especially pot-committed or immobilized. But with the right vendor, migrating data is simply a matter of following a proven, methodical process.

BambooHR’s implementation team, for example, provides customers with templates for each of the relevant data categories and staggers the import schedule during the implementation timeline so the customer doesn’t need to provide all of the data at once. We’ve found this makes for a more measured, stress-free experience, and we let customers know the data we’ll need for the next step in the process well in advance.

INTERNAL ACTION ITEMS TO EXPECT

- ✔ **Gather Your Data:** This includes everything from names, addresses, and shirt sizes, to job titles, emergency contacts, and benefits selections.
- ✔ **Clean Up Your Data:** To avoid bringing any “junk” data into your new HRIS, you’ll need to make sure everything is accurate, complete, and consistent.
- ✔ **Import Your Data:** This is usually done through a secure online portal. Your vendor will provide instructions and support to help you through this process.

“The implementation project plan creates an easy to follow process that helps customers get the most out of their implementation by breaking it into bite-sized chunks. The resources, videos, and data templates are designed specifically for new BambooHR users and the project managers are trained to identify ways to get additional value out of BambooHR.”

KYLE RIOS | IMPLEMENTATION MANAGER | BAMBOOHR

WHAT TO EXPECT FROM YOUR VENDOR

- **Provide Support:** Your new vendor should be a proactive partner in this process. They should provide clear instructions, templates, and support to help you migrate your data smoothly. They should also be able to answer any questions you have along the way.
- **Ensure Security:** A good vendor will also take **data security and privacy** seriously. They should have robust security measures in place to protect your data during and after the migration process and be able to provide you with their security documentation.

Migrating your data may still sound as appealing as a root canal, but by partnering with a vendor who prioritizes a streamlined, secure, and proactive experience, you may be surprised by how seamless data migration can be.

“Our implementation consultant really kept it moving along on pace and had clear and specific milestones with very specific information. I wasn’t left having to come back and say, ‘Is this what you want or is this what you want?’ The information I got from BambooHR was: ‘This is what we need. This is the format we need it in. This is exactly what it has to look like.’ And with that information, I was able to get that data from the other provider and upload it pretty seamlessly.”

JONATHON BARTLETT | CHIEF HUMAN RESOURCES OFFICER | INDICA LABS | US

5. Make Any Necessary Customizations

Once you’ve migrated your data, it’s time to tailor it to your specific needs. While many modern systems offer **robust out-of-the-box functionality**, some customizations may be necessary to align with your unique workflows and requirements.

INTERNAL ACTION ITEMS TO EXPECT

Strategic customization requires careful planning, collaboration with your vendor, and taking the following steps:

- ✓ Thoroughly document your current HR processes.
- ✓ Identify any gaps between the software’s standard features and your existing workflows.
- ✓ Prioritize customizations based on their impact on the following:
 - ✓ Efficiency
 - ✓ Compliance
 - ✓ User experience

WHAT TO EXPECT FROM YOUR VENDOR

Your vendor should provide guidance on best practices and potential limitations of customizations, including **how many customizations** are possible with their software, and what kind. Expect them to offer support in configuring the system and developing custom integrations. However, some level of internal involvement will likely be required, especially in user acceptance testing and data validation.

“[Our Project Manager] was exemplary. He demonstrated exceptional efficiency, understanding, and professionalism. His ability to balance project demands while maintaining a pleasant and patient demeanor made the training experience both effective and enjoyable. His expertise and leadership ensured clarity in complex processes, fostering a supportive learning environment. His dedication to excellence and willingness to guide others made a lasting impact, reflecting his strong capabilities as both a leader and mentor.”

STEFANI WILLIAMS | DIRECTOR OF ADMINISTRATION | ONE CAPITAL SOLUTIONS | US

COMMON HR SOFTWARE CUSTOMIZATIONS

- **Custom Fields:** Adding unique data points to **employee profiles** to track information specific to your organization.
- **Workflow Automation:** Configuring automated approval processes for tasks like time-off requests or performance reviews.
- **Reporting and Analytics:** Creating custom reports to track **key HR metrics** relevant to your business.
- **Integrations:** Connecting the HR software with other systems, such as **background check** and LMS platforms.
- **User Interface Branding:** Adapting the **look and feel of the software** to match your company's branding.

Choose a **complete HR software** and approach your customizations strategically to avoid over-customization, which can increase the complexity of your platform as well as maintenance costs. Tailoring the system is important, and your provider should make **integrations easy**, but you should focus only on the modifications that truly enhance the software's value and align with your overall HR strategy.



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Whether you're looking for specialized data tracking, advanced payroll functions, or personalized engagement tools, BambooHR works with you to provide perfect-fit solutions.

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"Implementing BambooHR provides an excellent foundation for customers' accounts. Each customer is assigned a dedicated Project Manager who tailors the onboarding experience to meet their specific needs. During implementation, customers can expect their Project Manager to provide training on how to use BambooHR effectively, assist with importing employee data, and develop an access plan to maximize the benefits of this powerful tool. With BambooHR, you gain a partner committed to empowering you to achieve great work."

JAKE ROCCO | IMPLEMENTATION MANAGER | BAMBOOHR

6. Plan Your Internal Comms

No matter how great your new HR software is, its success depends on your employees embracing it. Change can be confusing, so clear communication is key. Create a robust **internal comms strategy** to make sure everyone understands why you're making the switch, how it'll benefit them, and how to use the new system.

Here are a few action items to help you get there:

- **Communicate Early and Often:** Start communicating about the software change well in advance of the implementation date. This gives employees time to process the information and ask questions.
- **Be Transparent and Honest:** Be upfront about the reasons for switching software. Explain the challenges with the current system and how the new one will address them.
- **Focus on Benefits:** Highlight the advantages of the new software for employees. Will it **simplify processes**? Improve **access** to information? Emphasize the positive impact on their daily work.
- **Take a Multi-Channel Approach:** Use a variety of communication channels, such as email, **intranet posts**, town hall meetings, and even short explainer videos they can reference on their own time, as often as they need. This ensures your message reaches everyone.
- **Provide Training and Support:** Regularly point people to training opportunities and ongoing support resources. Empower employees to learn the new system with confidence.

- **Maintain Two-Way Communication:** Create opportunities for employees to ask questions and provide **feedback**. Address concerns promptly and transparently.
- **Celebrate Successes:** Acknowledge when milestones and new outcomes are reached as a result of the switch. At every opportunity, reinforce the positive impact of the change while being transparent and proactive about any negatives.
- **Lean on Your Internal Implementation Team:** Remember the team you assembled in step one? These are your “adoption ambassadors.” Let them help you spread the word about the new software across their immediate teams.

Effective internal communication is crucial for a successful HR software implementation. Getting your messaging right can significantly impact employee adoption and the overall success of your efforts.



“We had been with our previous system for probably 25 years. And from my previous experience with a company that did implementation, I knew how it can be a nightmare sometimes, especially for a company like ours that had had everything stored in one place for so long. But the BambooHR team is very responsive and positive. The customer service was a great selling point—always willing to help, multiple ways to get a hold of people. It was the biggest draw of BambooHR, also just having everything in one system that’s easy for anyone to use.”

PRICILLA GANE | PAYROLL LEAD | ARCTIQ | US AND CANADA

7. Train Your HR Team and Employees on the Software

A **well-trained team** not only helps you get the most out of your investment, but they’ll also be able to pass that institutional knowledge onto their team members and any new employees who come on board after the switch. can significantly impact employee adoption and the overall success of your efforts..

INTERNAL ACTION ITEMS TO EXPECT

While your vendor may provide training materials, online tutorials, and even on-site sessions, your responsibility is making sure all employees, including your HR team, receive the appropriate training. This means offering different ways (like the ones listed below) to learn how to use the new software, tailoring training content accordingly, and promoting a culture of continuous learning.

WHAT TO EXPECT FROM YOUR VENDOR

Your vendor should be a key partner in this process, offering resources and expertise that make **learning new things** feel easy. Remember, your vendor is as invested in your success as you are—their reputation depends on it. They should be eager to collaborate with you on a robust training plan.

“After completing all of the training and understanding all of the functions, it was easy to see that the implementation was easy and not as daunting as I thought it was going to be. [Our project manager] was absolutely wonderful to work with. She was very encouraging, very professional and very friendly as well. She was able to respond very well to some of the unique circumstances of our project.”

SANDRA BAUMEISTER | ADMINISTRATOR | ORENDA | CANADA

Here are some training activities and resources to look for from your vendor or consider creating:

- **Role-Based Training:** Tailor training sessions to specific roles and responsibilities. HR staff will need in-depth training on administrative functions, while employees may only need to learn how to use self-service features.
- **Hands-on Workshops:** Provide opportunities for employees to practice using the software in a simulated environment. This allows them to become comfortable with the system before using it in a live setting.
- **Online Tutorials and Videos:** Offer readily accessible online resources, such as video tutorials and FAQs, for employees to refer to as needed.
- **User Guides and Documentation:** Provide comprehensive user guides and documentation that employees can consult for detailed instructions.
- **Train-the-Trainer Sessions:** Train key members of your HR team to become internal trainers, enabling them to provide ongoing support to other employees.
- **Vendor-Led Webinars:** Leverage your vendor's expertise by co-leading webinars on specific topics or features of the software.
- **Quick Reference Guides:** Create concise, easy-to-use reference guides that employees can keep at their desks for quick access to key information.

By planning a comprehensive training program for your employees, you can empower your HR team and the employees they serve to **discover game-changing benefits** from your new software.



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8. Get Familiar with the Software's Support Team

Even the best-laid plans must account for some hiccups. You may encounter occasional snags or glitches post-implementation. As you transition from implementation to ongoing use, you'll want to get familiar with the vendor's customer support request protocols and expectations.

Take the time to familiarize yourself with the support resources available. Many vendors offer online help centers, knowledge bases, and FAQs for quick answers to common questions. For more complex issues, you might need to submit a support ticket or contact the support team directly. Understand their service level agreements (SLAs) and typical response times.

"Everything has been easy to implement and understand during the process. Questions were answered in a very timely manner. Support was immediately available when needed! [Our project manager] was fantastic! He made the implementation process fun and easy!"

**DANYEL HARRIS | HUMAN RESOURCES DIRECTOR |
WHOLE PERSON CARE CLINIC | US**

Here are some common issues you might encounter during the initial days and weeks of using your new HR software:

- **Data discrepancies:** Double-check that all data has been migrated correctly and that there are no inconsistencies.
- **Workflow hiccups:** Test your **automated workflows** to ensure they are functioning as expected.
- **Reporting challenges:** Verify that your custom reports are generating accurate data.
- **User access issues:** Confirm that all employees have the appropriate **access levels** and permissions.

Remember, switching to a new HR software vendor is an opportunity to improve not only your technology but also your support experience. Choose a vendor that prioritizes customer support and offers the level of service you need to ensure your ongoing success.

“As a sales rep, I so appreciate having implementation and support teams that I can trust and rely on to take the best care of our clients! I love to brag about how responsive our teams are while I’m introducing prospects to BambooHR. For many prospective customers, they’re leaving their current providers because of poor customer support, and I’m filled with pride when I can confidently tell them that we’re going to take good care of them.”

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