

Best practices for navigating your UKG implementation

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Introduction

As one of the world's leading providers of human resources (HR), payroll and workforce management solutions, UKG helps more than 80,000 organizations worldwide across every industry meet their human capital management (HCM) needs.

The right implementation approach is key to making the most out of UKG Pro, UKG Pro Workforce Management and UKG Ready. With over 26 years of experience consulting with UKG, RSM has developed a set of implementation best practices based on hard-won experience, specialized skills and specific industry knowledge.

In this best practice guide, we'll cover:

- How to prepare for your UKG implementation
- Implementation best practices
- Post-implementation activities to keep in mind

While this guide cannot replace a certified, experienced implementation consultant, we hope it can help you better understand and engage in the complete implementation process so you can do your part to create a better outcome.

Implementing your new system is a case of getting out what you put into it. If you choose to skip best practice elements or simply "lift and shift," you likely won't experience the full benefit of the system. The truth of implementation is that doing it right takes much more planning, time, skill, experience, system knowledge, training, testing and patience than most people realize. That is why most organizations invest in third-party project management, skill augmentation, data support, systems integration, testing and training guidance.



One of the
RSM team





Preparing for your UKG implementation

No two businesses or industries are alike, which means every UKG implementation is unique. We begin every UKG implementation engagement with a deep dive into the business and infrastructure of our clients so that we can provide a bespoke implementation that meets their exact needs. Here's what our approach entails.

Pre-planning analysis: Determine a destination

The beginning of every implementation starts with the end vision. What do you want to accomplish? In this stage, take the time to gather the relevant stakeholders across your organization—such as HR, finance, IT and operations—to define your overall goals and objectives. By understanding where your business wants to go, you can then determine the role your UKG solution will play in supporting success.

Define your implementation needs: Make a map

Once you know where you want to go, it's time to create the map to get there. In this stage, you'll work with your stakeholders to uncover the specific needs for each stage of your UKG implementation, including:

- > **Requirements:** Determine the core capabilities your organization will require from UKG to meet your business objectives.
- > **Discovery:** Analyze your current HR processes and systems to uncover needs, gaps and areas for improvement.
- > **Configuration:** Define the customization requirements required to align with your industry and your specific organization's workflows and processes.
- > **Data migration:** Outline what data you'll need to transfer or connect to UKG, along with the IT and HR representatives who will be responsible for overseeing the migration.
- > **Training:** Develop a comprehensive training program customized for the unique needs of HR administration and employee end users to accelerate adoption.
- > **System valuation:** Establish the key performance indicators (KPIs) you'll use to evaluate success, such as improvements in HR efficiency, lower costs or increased employee productivity.
- > **Testing:** Design a detailed testing plan to validate your UKG implementation's functionality, data accuracy and integrations before you go live or take your existing system offline.

Choose an approach: All at once or in stages

Now that you know where you want to go and how to get there, the next thing to do is determine the implementation approach that fits the needs of your business, goals and timeline.

- > **All at once:** In a large-scale, comprehensive implementation, you'll deploy UKG across your entire organization simultaneously. While this approach requires significant planning and resources, once completed you'll ensure that your entire employee population is benefiting from the same system. This will also allow you to sunset legacy systems faster, which can reduce IT costs and headaches from having to manage multiple HR systems.
- > **In stages:** By taking a phased approach, you can deploy UKG a little bit at a time to specific teams, departments or locations. This can help make your implementation easier to manage while helping you leverage learnings from each stage to optimize future phases. However, this can also mean that your overall implementation will take longer, along with creating a fragmented experience between employees who are on the new system versus the legacy system. HR and IT will have to manage multiple systems, increasing overall costs.

Which systems or integrations need to be taken into account?

Depending on your organization, you'll need a plan to migrate or connect data from across the organization, including:



The existing HCM system



Other HR applications



Payroll and finance systems



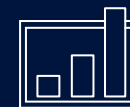
Third-party time-tracking systems



Learning platforms



Cybersecurity solutions



Reporting and analytics

Preparation checklist

Here is a rough guide of what to expect for each stage so you can prepare ahead of time



Project kickoff

- > Identify project team
- > Conduct preplanning analysis
- > Gather documents
- > Establish a change management process



Requirements

- > Define requirements
- > Conduct discovery
- > Identify data migration needs
- > Establish project timelines



Implement

- > Configure the system
- > Convert data
- > Integrate systems



Test

- > Validate system
- > Conduct user testing
- > Verify data migration and integrations



Go-live

- > Train HR staff
- > Train end-users
- > Provide support



Implementation best practices

Based on our collective decades of experience implementing UKG solutions, here are some top best practices to incorporate into your process.

1 Conduct a needs assessment

A comprehensive needs assessment will help ensure that you don't "lift and shift" issues with your old HCM into your new UKG solution. Your needs assessment should include a full analysis of your business needs, your requirements for your future state and a list of legacy product pain points that you want to make sure to alleviate.

2 Define your team

Build a project team that can drive and manage the implementation from beginning to end. The team should be well-rounded to include skills and experience across payroll, benefits, HR, finance, IT and lines of business; an experienced consultant can help fill in any skills or experience gaps. To reduce friction, make sure the project has an executive sponsor who will champion and promote the project with company leaders and across the organization.

3 Conduct strategic planning before the implementation

A little planning upfront can save you weeks or months on the back-end. Create a detailed implementation blueprint that outlines each phase of the implementation process. Include your plan for change management and assess data integrity before conversion. Plan your pre-launch testing and support for the first four payroll cycles post-launch to work out any kinks.

4 Start with a kickoff

By bringing your entire project team together for a kickoff meeting, you can ensure that everyone starts on the same page. The meeting should include all stakeholders, project team members and any supporting consultants, and should cover project goals, timelines and expectations for the entire implementation road map.

5 Evaluate and fill your gaps

As you finalize your plan or even after you begin your implementation, you may discover gaps in your team's skills or experience. While the gap can sometimes be filled in-house, the time and expense of pulling people off their day jobs can cause unnecessary business disruption. To fill gaps, consider leveraging outside implementation providers who can help improve time to value.

► Talk with us today to learn how to unlock business value with UKG

6 Migrate data strategically

Your UKG implementation will live or die on your data. When crafting your data migration strategy, prioritize data accuracy, completeness and security. You can also consider whether you need to bring in legacy data systems that may or may not still be relevant. The more time you spend mapping out your data sources, cleansing data of inaccuracies and considering how you want to leverage data in the future, the less time you'll spend struggling with issues down the road.

7 Engage in comprehensive testing

Before you roll out your UKG solution to your entire team, conduct rigorous testing of all your UKG features and capabilities, including end-to-end processes, user interfaces and integrations with other systems. Make sure you include end users in your testing to discover how your employees will actually use your system; rather than expecting them to use the system by the book, use their feedback to adapt the system to their needs and expectations. Don't rush this stage; a few months of upfront testing can save years of frustration later.



8 Engage in change management

As part of your change management process, design a training program that is tailored to the unique needs of your different user audiences, such as HR, IT and end-user employees. Make sure you capture feedback throughout training so you can identify areas for improvement or potential areas of friction that may affect wider adoption. This is often considered an optional element of implementation, but for the best result, it shouldn't be overlooked.

9 Optimize, optimize, optimize

A successful implementation isn't the end, but the beginning. Have a plan in place to continuously optimize your UKG solution after implementation to correct frustrations, tweak system set-up elements to better meet needs, enable automation, implement additional modules and future-proof your use of UKG as your organization grows and adapts.



Planning for post-implementation

While you're likely focused on getting an implementation off the ground, it's never too early to think about everything you'll need to support your UKG solution post-implementation. Here are a few things to consider:

Prepare for go-live

In this stage, you'll want to conduct a thorough go-live readiness assessment to ensure the solution is ready to deploy. In addition, you should have a complete communication plan in place to inform all stakeholders about the go-live schedule, expectations and where to find support. At this point you can also finalize your timing for training, your cutover strategy and who will be responsible for providing post-go-live support. Since you may not have necessary experience on staff, consider whether you need to engage an outside vendor for additional training and support after launch.

User training and adoption

Make sure you offer comprehensive training programs and resources customized to each department or role to ensure that all employees are proficient with UKG from Day 1. To improve adoption, consider user adoption strategies such as incentives or recognition programs. You should also have a plan in place to keep users engaged in the weeks and months post-implementation to enhance your training programs, promote new features and optimize your UKG use to meet user needs.

Support and maintenance

Define the UKG support channels you'll use across internal support teams, vendor product support and outside support vendors. To avoid user frustration, clearly list how users can leverage support, along with expected response times. You should also outline your process for ongoing system management to ensure that your UKG solution receives regular updates, system audits and performance monitoring.

Review and evaluation

Before you consider your implementation complete, solicit user feedback to learn about their experience with the system and the overall process. This can help you identify areas for further UKG optimization, along with ideas for how to improve future implementations. You can also measure the solution's performance using the KPIs you defined during preplanning for additional optimization insight. Start compiling a list of future adjustments and optimization recommendations, along with Phase 2 recommendations for new modules or functionality if applicable.

Accelerate UKG implementation with RSM

As you can see, there's no such thing as a simple, turnkey UKG optimization. It takes time, resources and experience that many organizations don't have in-house. That's where RSM comes in.

RSM is a full-service consulting firm and the leading provider of assurance, tax and consulting services focused on the middle market. With over 73,000 clients across 20+ industries, we deliver leading technology, financial, transaction risk and business consulting services.

As one of the top UKG consultants in the market, RSM offers full life cycle support across UKG selection, implementation, post-go-live services, optimization and online system administration.

RSM's team functions as an extension of your team, providing comprehensive advisory, knowledge transfer and support. RSM's consultants hold UKG product certifications, with many holding additional industry-specific

certifications. Our consultants understand not only your business needs, but also your system requirements to help you maximize your UKG software.

Our unique advisory approach means that RSM can look at your business holistically—instead of at the individual software or hardware level—and then tailor our solutions and services to your business. Every engagement includes a deep dive at the beginning of the project to understand your needs, allowing us to provide your company with solid recommendations.

In addition to over 25 years of experience consulting with UKG, RSM brings years of experience integrating HCM and enterprise resource planning software. RSM has a deep bench of professionals who are well-versed in Oracle NetSuite, Microsoft Dynamics, Sage Intacct, Salesforce and many other platforms. This helps ensure that your UKG solutions can be optimized to maximize the ROI of both UKG and your other connected solutions.

RSM and UKG by the numbers



26+ years certified UKG provider



9.8/10 satisfaction score



Five-star consulting provider per [Raven Intelligence reviews](#)



50+ UKG Pro/UKG Pro Workforce Management certifications

► Talk with us today to learn how to unlock business value with UKG

UKG

Certified Partner

RSM'S UKG services

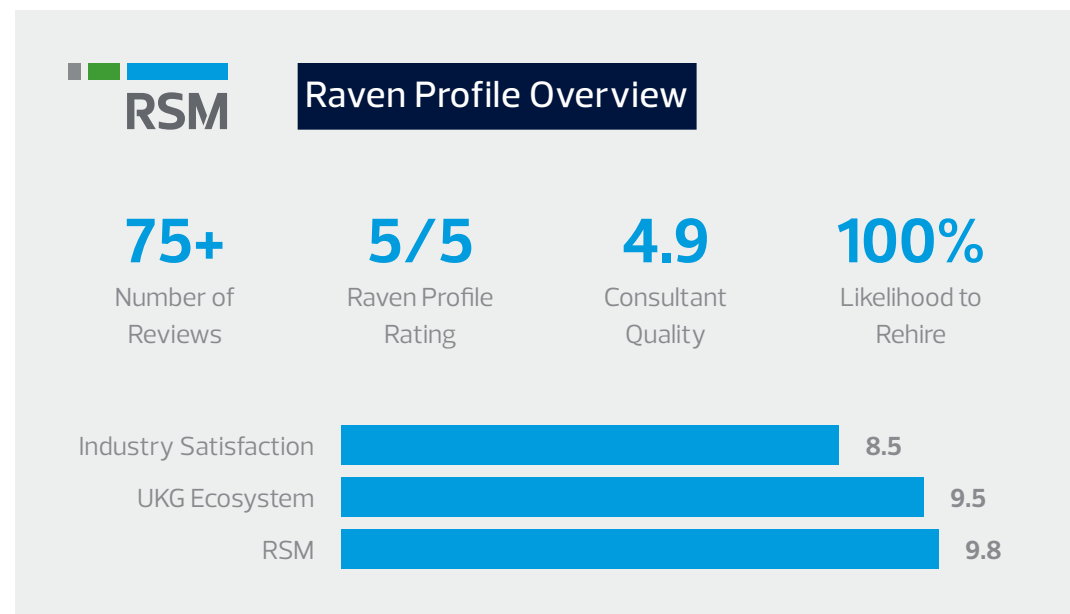
No two businesses—or implementations—are alike. That's why we take a customized approach to every engagement that considers your unique needs and goals, company size and complexity, data quality and accuracy to be converted, specific industry requirements, and desired implementation approach.

While RSM does not directly sell UKG solutions, we can assist you in selecting the UKG solutions that best fit your organizational needs. Your organization will purchase product licenses directly from UKG. RSM's team will then help your company implement the new software and optimize it for your specific systems and usage.

The RSM team is experienced with every UKG offering, assuring that you choose the right solutions and services for your objectives and that you hit the ground running with implementation as soon as your new licenses are active. With RSM's experienced advisors, your business receives optimal value and benefit from your UKG investment.

RSM's UKG customer satisfaction

Customer approval is a critical metric for any implementation provider, and RSM is proud of our clients' satisfaction. According to dozens of independent reviews collected by Raven Intelligence, RSM's UKG implementations receive five out of five stars, along with a 9.8/10 partner satisfaction rating and a 100% "likelihood to rehire" score.



2022 and 2023 Raven Intelligence Customer Project Success Award Finalist



We value all our client relationships and stand behind all the work we do. Here are a few words from several of our UKG clients:

“ Without the relationship with RSM, I wouldn't have been able to make as big of an impact here. Part of the reason our HR team has been able to accomplish so much is that RSM is a shortcut to ensuring we are moving in the right direction and using time effectively. With RSM, you get a continual return on your investment.

—**Kim Wingren**, manager of HCM, Blount Fine Foods

[Read the Blount Fine Foods case study](#)

“ A primary driver of choosing UKG Pro was the self-service/payroll portal enabling us to meet goals of higher employee engagement. We wanted (an advisor) with the ability to tell us the best way to do this using the tools we have, and also from a business process perspective. We wanted to use the best-practice approach in workflows, not just in tools. RSM has helped our team become well-versed and know what they need to do as well as how to get it done.

—**Carolyn Clougherty**, HR transformation operation leader, Keolis North America

[Read the Keolis North America case study](#)

“ They understood the HR side, the payroll side and the taxes, so that was very helpful in getting our implementation off the ground so quickly. RSM more than exceeded my expectations. They were always very responsive. I value the relationship we have with RSM.

—**Kathy Fearington**, payroll manager, Krispy Kreme Doughnut Corporation

“ RSM became an extension of our team as if we had the experience of going through an implementation before, even though we didn't. They knew what was needed ahead of time. I feel like we didn't hit the ditches because they had the experience that is a level beyond executing and implementing.

—**Richard Bell**, senior director of business systems, Krispy Kreme Doughnut Corporation

[Read the Krispy Kreme case study](#)



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Conclusion

As a top UKG provider, RSM's consultants know UKG solutions inside and out. We can implement your UKG usage so you can reduce your time to value, enhance the stakeholder and user experience, and ensure your implementation is completed on-time and on-budget.

For more information about RSM's UKG implementation services, contact RSM at +1 800 274 3978 or [visit us online](#).

For more information

call us at +1 800 274 3978 or **contact our team here.**

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