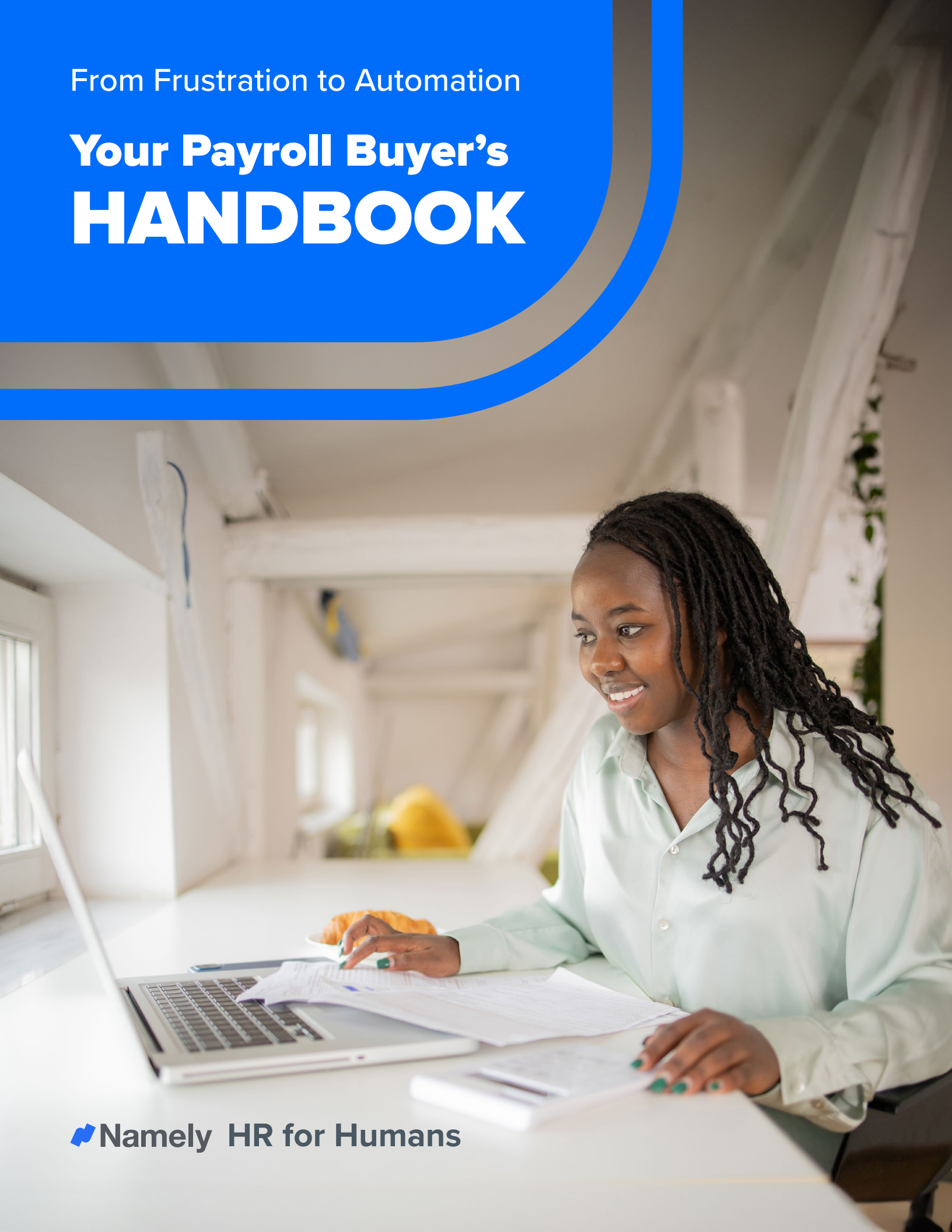


From Frustration to Automation

Your Payroll Buyer's **HANDBOOK**



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What is Payroll Tech and why do you need it?



Processing payroll can be cumbersome and time consuming. Whether you're using spreadsheets or tediously pulling reports, manually running payroll can be frustrating and prevents you from spending time on other important areas of HR.

So how can you automate your payroll processing to save time?

Enter payroll technology.

Payroll technology is any software that helps HR teams manage and organize employees' payments. Whether your company's pay cycle is weekly, monthly, semimonthly, or biweekly, these paperless solutions reduce human error and the time it takes to process payroll. In addition to tracking pay cycles, payroll technology can also customize and cut down time on reporting.

However, HR and finance teams aren't the only ones who benefit from such technology. If a payroll software is easy to navigate and user-friendly, it also simplifies employees' experiences. Some payroll solutions enable employees to view their pay stubs, tax information, W2s, and more — all from one portal.

So with that said, are you in the market for new payroll technology, but don't know where to start?

From different software features to the 5 stages of the buying process, we've got you covered in our Payroll Buyer's Guide.





SaaS Features

SaaS Features

The need for modern ways to manage payroll is becoming more apparent. In fact, [29 percent](#) of businesses use a payroll system that is 10 years old or older. Many HR professionals are ready to make the change to upgrade how their business processes payroll and introduce more efficiency into their organization.

The HR payroll function is one of the main areas where companies rely on the benefits of using SaaS. Software as a Service, commonly referred to as SaaS, is a method for delivering software through the Internet. When subscribing to a SaaS payroll solution, a business can access the software through the use of login credentials—the provider runs the application on their own servers and hosts the solution.

From payroll processing to tax compliance, there are many advantages for HR professionals when using a SaaS platform. SaaS provides a simple, effective, and accurate way to update systems, so HR can spend more time developing their people. SaaS can also help save on the expense, space, and time that would be needed to host an on-site solution.

When looking into SaaS payroll providers and features to improve efficiency within your organization, it's important to consider factors such as business needs, user base, budget, and ease of use. Thinking along these lines will enable you to select the best payroll software solution for your business.



SaaS Features

PAYROLL PROCESSING

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It's important to focus on payroll functions that meet your unique requirements. If it's likely that there are a diverse set of needs within your employee population, your payroll software should be able to accommodate different groups of employees. For instance, if the system offers flexible pay, employees can be paid outside of your typical payroll cycles. This type of payroll system should also enable multiple payment vehicles, such as direct deposit or debit card. This flexibility can help reduce financial stress for employees and save hours of time for the payroll department.

Read on to learn more about other key payroll features to determine how they best suit your business.

When thinking about payroll processing features, here are some key questions to keep in mind:

- How do you typically pay employees?
- Does the system support local laws?
- Does the system support bonuses, commissions, and other one-off payments?
- Does the system support contractual service?
- Is this integrated to a time tracking solution?
- Is it easy for you to make edits and overrides?
- Does the system allow you to preview payroll results before submitting?

SaaS Features

ADMINISTRATIVE BACKEND

Most of the essential functions within payroll are managed on the backend of the payroll system to save on time and administrative burden. While evaluating which payroll features to select for your organization, it's essential to ask yourself the following questions:

- Do we have a dedicated payroll person or team in house to manage the system?
- How easy is the system to learn and understand with minimal training?
- Does the system integrate with the general ledger, or other employee systems, such as rewards & recognition, hr, benefits, etc.?
- How much technical ability will our company require from the system? For example, if you have only salaried employees, you can select a simpler software. If you have different categories of employees across the world, you will need a more dynamic system.

Now that you've thought through the answers to those questions, here is an overview of the most interesting and important administrative features that payroll software can help manage:

- **Deductions**
- **Tax Management**
- **Benefits Management**
- **Time and Attendance Management**
- **Record Keeping**
- **Compliance Management**
- **Security**



SaaS Features

ADMINISTRATIVE BACKEND

Deductions

Payroll systems must do much more than simply record work hours and pay. They must be able to manage more complex tasks, such as deductions for tax, benefits, and garnishment purposes. As mentioned earlier, calculations include state and federal taxes, medicare and social security, in addition to whatever contributions each employee makes based on their benefit plan.

Although the system can automate deductions, it's still important for all payroll staff and outside contractors within your organization to be well versed in which deductions are required under law.

Tax Management

Many payroll systems can be customized to meet your tax and benefits needs, and can be further adjusted to accommodate the circumstances of each employee. These payroll systems have a tax management feature, which automatically calculates the federal, state, local, and other tax that is deducted from each paycheck. It can also automatically calculate any changes in tax code and actually pay and file taxes on the company's behalf. This feature is a critical step for ensuring accuracy, complying with tax codes, and keeping them up to date. Regardless of which payroll system you use, your company will be responsible for accurate reporting and payment of payroll taxes.

Benefits Management

This feature of the system helps to automatically track benefits that are offered, such as insurance, retirement, vacation and sick days, as well as any other benefits. This tool can either be a built-in part of the software or part of a separate module, depending on the provider. It is a useful resource in ensuring that employees benefits management plans are being processed correctly, and that they are accurately coordinated with payroll. Having your benefits platform directly integrated with your payroll platform can save your business time and money, as combining these manually opens up a lot of risk of error if you need to manually edit payroll every time someone changes their benefits.

SaaS Features

ADMINISTRATIVE BACKEND

Time and Attendance Management

This essential function of the payroll platform records the time employees have worked, as well as accruals for any vacation and sick time. Hourly employees can generally clock in with this tool through a time clock within the online payroll software. Employee attendance data can be easily entered and stored into the payroll system.

If your workforce is located in diverse locations and you need adjustments made for multiple shifts, permissions, or overtime requirements, ensure that your payroll software technology can meet these needs. Rules can be created for meal breaks, shifts, schedule start/end times, as well as overtime and calculations for daily, weekly, and weekend overtime.

There are also multiple options to consider for entering time into the system, including biometric readers, badge terminals, online entry, phone-in, or through a mobile app.

It's important to note that some payroll software technology has the time and attendance feature built in, but others may have an integration with an attendance module. This module helps eliminate duplicate data entry and keeps employee time data organized in one place.

Record Keeping

With SaaS technology, the records created within the payroll system can be stored electronically, via a cloud system which helps save on storage space and is more environmentally friendly. These records can be used to keep a detailed and accurate account of employees' historical data. If needed, you can draw upon any of the information in an instant, and when the data is no longer necessary, the process of elimination is quite simple.

This database of records allows you to gather insight on information such as employee time trends and participation in your company's retirement plan. Records also indicate that you are compliant with all applicable laws and regulations, which can prepare you for a financial audit or any other type of investigation. Setting up your system to monitor these activities is also a great way to ensure a smooth transition for tax preparation at the end of the year.

SaaS Features

ADMINISTRATIVE BACKEND

→ Compliance Management

It's essential to mitigate risk by making sure you are staying compliant with certain laws and regulations, such as the Equal Employment Opportunity Commission (EEOC), Fair Labor Standards Act (FLSA), and the Department of Labor.

The right payroll system can help ease these concerns through creating rules and customization within the platform, and ensuring reports are filed correctly and punctually.

With the payroll system handling these matters of high sensitivity, it will reduce the likelihood of tax audits, improve the chances of passing an audit, and minimize the risk of being penalized for noncompliance issues. If your company is ever audited, it will be hugely beneficial to have your payroll data housed in one place with secure access.

→ Security

Another excellent feature of SaaS payroll software is the security measures you can take to protect sensitive employee data, such as social security numbers, checking and savings accounts information, home addresses, and family member data. Many payroll providers use multi-factor authentication (MFA) as well as data encryption to create an added layer of security. They may also provide access to a risk assessment team. This amount of confidential data could lead to enormous repercussions if not managed properly, so having a secure payroll database should be a top priority.



SaaS Features

REPORTING

Now that you've figured out what features you'll need on the backend, it's time to consider the payroll system's critical reporting capabilities and understand exactly what you'll need provided.

The key to good reporting is to keep it simple — look for options that help reduce the stress associated with the end of cycle reporting process that many payroll managers are confronted with.

For example, if you're looking for something user-friendly, you may want to choose a payroll system that provides crucial numbers in a visible dashboard, or one that's been proven over time to fit customer needs.



Although payroll platforms can provide access to reporting templates, there will be times when you need reporting that is more specific and robust. When dealing with ad-hoc reports that managers often ask for, custom reporting can be a great solution. Custom reports should be easy to use and intuitive for the payroll administrator. The fields within the report should be clear and simple to create.

Once you have your custom reports built out, you can save time later by opting to automatically generate any custom reports. The payroll platform should be able to generate reports on demand, without much difficulty on the user's end, as many admins may be using the system for the first time or have trained on another system.

For instance, If the Head of the Finance department is looking to run an analysis of the monthly cost of labor across all locations, you can readily find this information if you have the configured fields saved in an easy-to-read and accessible custom report.

If you're asked to pull overtime reports because department managers need to review employee weekly schedules, you should be able to prepare them quickly and efficiently. These sorts of reports can effortlessly help you determine where to adjust employee time accruals, as well as give you insight into overtime trends within the various departments.

SaaS Features

REPORTING

To take a deeper dive, let's look at the different reports in terms of which ones are must-haves vs. nice-to-haves:

→ Must-Have Reports

Payroll Register	This report should provide a breakdown of client: Wages, Employer & Employee Taxes; and Employee Deductions, for each employee within the date range specified.
Payroll Summary	This report should provide a detailed summary of client: Wages, Employee Deductions, Employer and Employee Taxes; Direct Deposits, Payroll Fees, Check Net, and Total Bank Transfers for the date range specified.
Cash Requirement	This report should provide a detailed summary of: Wages, Hours, Employee Deductions; and Employer and Employee Taxes, for the date range specified.
Net Check Register	This report should provide a detailed breakdown of: Wages, Employer and Employee Deductions, Employer and Employee Taxes; and Hours, for each employee within the date range specified.
Deductions	This report should provide a detailed summary of all employee Deductions and Accruals for the date range specified.
Employee Census	This report should provide a list of only the Employees who were Active during the date range specified. This report helps insurance brokers provide an accurate rate quote.
Employee Deduction	This report should provide a list of only the Employees who were Active during the date range specified, and includes their Deduction Information.
Employee Wage	This report should provide a list of only the Employees who were Active during the date range specified, and includes their Wage Information.
Employee Changes Report	This report should provide a detailed summary of any employee changes from the previous payroll period to the current cycle, such as deductions or salary changes.
Pay Cycle Change Report	This report provides a detailed breakdown of any changes between your previous and current payroll runs including differences between wages, taxes, deductions, etc
Quarterly Tax Reconciliation	This report should provide a detailed summary of any employee changes from the previous payroll period to the current cycle, such as deductions or salary changes.

SaaS Features

REPORTING

→ Must-Have Reports Cont'd

Federal Reports

Form 941 – You will use Form 941 to report Federal income, Social Security, Medicare and Wages, as it pertains to your employees' paychecks. It must be filed every three months and is due by the last day of the month following the end of a quarter (i.e., April 30, July 31, October 31, January 31).

Form 944 – Only certain businesses may use Form 944. It depends on the total amount of social security, Medicare, and federal income taxes you withhold each year. The IRS will notify if you are eligible to file Form 944 instead of Form 941. Form 944 is due January 31 following the end of the current year.

Form 940 – This is a payroll report submitted annually that indicates federal unemployment tax (FUTA) paid during the year. Form 940 is due January 31 following the end of the current year.

W-2 – This form summarizes an employee's gross pay for the year and includes information on how much you withheld for local, state, and federal deductions (based on the employee's specifications on Form W-4). W-2s are due by January 31 following the end of the current year.

W-3 – This form is the document you would use to submit Form W-2 to the Social Security Administration. It summarizes all the W-2s for your business and is due by January 31 following the end of the current year.

Paid Time Off

This report should provide a summary of employee's vacation and sick time balance, vacation/sick time used, and maximum hours, for the date range specified.

Overtime

This report should provide a summary of total hours worked, and the number of days with more than 8 hours worked, within the date range specified. This report will allow you to see how often your team is working overtime hours, and if this overtime work is infrequent, cyclical, or ongoing.

New Hire Report

This report should provide a list of employees who were hired within the date range specified. A new hire report is necessary for states to use that information to enforce various laws and benefits (i.e. child support or detection of false workers compensation claims)

General Ledger Report

This report should provide a General Ledger for the current pay cycle broken down by department, class, branch, and division. The information in a payroll ledger comes from financial records such as work schedules, hiring paperwork, and tax documents. It keeps track of a company's financial transactions, including expenses, assets, liabilities, revenues and equity.

SaaS Features

REPORTING

→ Nice-to-Have Reports

Compensation Analysis

This report should provide an organization-wide review of how your jobs are classified and compensated. Performing a compensation analysis is an efficient way to review how your employees are being paid, and to ensure they're being compensated fairly for the work they are doing.

Salary Analysis

This report should provide a review of employees' salary histories and proposed salary changes. Supervisors can use this report to verify that the proposed salary changes are correct before you update employee records with those changes.

Pay Type

This report should provide a detailed breakdown of employee Wage Earnings for each Pay Type within the date range specified.

Company Fee Details

This report should provide a detailed breakdown of the Payroll Processing Fees charged for the current pay cycle.

Employee Banking/Taxing Info

This report should provide a list of only the Employees who were Active during the date range specified, and includes their Bank Information.

W2 Preview Report

This report should provide a snapshot of what data will be pulling onto the W2.



SaaS Features

EMPLOYEE SELF-SERVICE

The employee self-service tool is a great resource for the organization, as it gives employees the flexibility to review or access personal information, such as their pay stubs, bonus, benefits, and required work hours, with privacy and security. They can check in on details at their convenience, and request that information be updated as needed, which makes the work of the payroll department less tedious and reduces the risks of errors.

One of the best characteristics of the self-service feature is that it can provide access to critical information throughout the entire employee lifecycle, from pre-employment to post-employment.

Pre-employment: Prior to their start date, new hires can be assigned to complete required forms such as their W-4s and I-9s securely and electronically, as part of the company's self-onboarding process. If they have any questions, it can even be auto-routed to the right company representative for an answer.

During Employment: Employees can easily retrieve any of their personal information at any time. They're able to update their personal banking information, review withholdings, view PTO accruals and request time off, and download their W2s and 1099 forms. Certain payroll software technologies also offer streamlined employee portals with integrated systems for benefits and open enrollment, as well as compliance training.

Post-Employment: After an employee or contractor leaves the company, they may still want to access pay stubs and personal tax documents, without requiring the help of a payroll administrator. A self-service tool allows former employees to view the history of their data all in one place, such as W2 information and old pay stubs they may need for proof of income or employment. They may also electronically sign off on certain required post-employment documents, without taking up additional administrative resources and time. Without the assistance of a self-service feature, payroll administrators will have to manage this process independently, which can be time consuming.



Service Features

Service Features

Payroll platforms are more than just personality-less software (or at least they should be). And most companies that offer payroll SaaS features allow customers to supplement their basic payroll tech functions with services (or—again—at least they should).

But what kind of payroll services exist?

And which are right for your unique business?

Well, those questions may be answered simply by the size of your company. For instance, if you have less than 50 employees, it may make the most fiscal sense to rely on a professional employer organization, also known as a PEO.

So let's start there.



Service Features

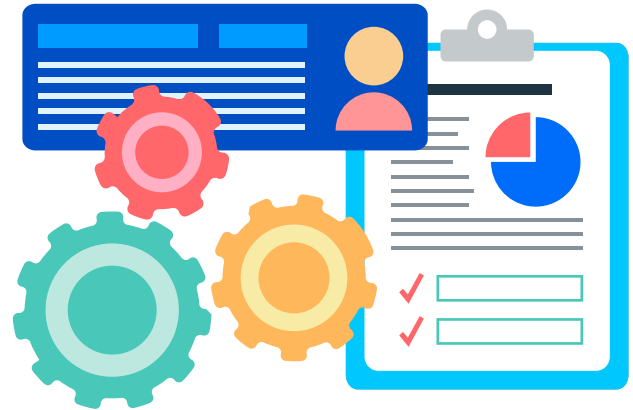
PEO SERVICES

A Professional Employer Organization (PEO) is a third party HR and payroll outsourcing company that acts as a co-employer with your business. For smaller businesses (usually under 50 employees), a PEO can help remove the burden of HR and payroll management and provide employees with automated access to health and retirement benefits such as HR and payroll.

PEOs take on all HR, payroll, and compliance responsibilities for their customers, and are usually an option for companies without a designated HR or payroll professional looking to outsource their duties.

Clients enter into a “co-employment” relationship with the PEO, where the latter becomes their workforce’s employer-of-record for tax and compliance purposes. In this relationship, the company retains the right to manage employees, while the PEO handles wages, taxes, and benefits.

Using a PEO for payroll means that your company reports the number of hours worked by each employee to the PEO, which then calculates employee paychecks and tax liabilities. The PEO will also pay your employees (with checks or direct deposit) and file and deposit taxes on your company’s behalf. To do all of this, the PEO uses its own tax identification numbers, rather than your company’s.



PEOs also can:

- Keep the company’s accounting books current with expenses and income
- Manage and administer benefits packages
- Handle workers’ compensation insurance
- Issue W-2s
- Administer 401(k) and retirement plans

While the PEO structure offers great benefits to SMBs, many growing businesses eventually decide to bring HR and payroll in-house.

When your organization meets this milestone, it can feel overwhelming to jump straight to in-house payroll. That’s why many mid-sized businesses turn to HR platforms offering managed services to help alleviate some of that stress.

On top of the SaaS and self-service aspects of those platforms, most also offer one-off services or fully managed payroll services at a more cost effective rate.

First, let’s take a look at some of the one-off services (either included or an extra rate) that many payroll platforms offer.



Service Features

ONE-OFF SERVICES

→ Tax Filing

Some payroll platforms will handle all federal, state, and local tax filing and reporting and ensure tax calculations stay up to date down to the lowest local level.

→ State Tax ID Registration

Expanding to new states? Make sure your payroll provider can take on the burden of new state tax ID registration and setup.

→ Garnishment Administration

Reduce the risk of penalties by finding a payroll provider who can manage everything related to your employee garnishments from child support to alimony and beyond.

→ Year End Prep

Many payroll providers have the option of handling W-2s, 1099s, and more for you. Some even automatically generate and file 1094s and 1095s.

→ Check & Report Printing

Especially in a remote working environment, check and report printing can be a major hassle. Some payroll platforms offer this as a service to take it off your plate.

→ Employment & Wage Verification

If your employee is trying to take out a loan, apply for an apartment, or do any other number of life events, you may be asked to verify their employment and income. Ensure your payroll platform has partnerships with companies like Equifax, so that you no longer have to add that to your to-do list.

→ International Payroll

If you have less than 100 employees in another country, it often doesn't make sense to process your payroll there yourself. If your payroll tech vendor doesn't do it themselves, many platforms easily integrate with solutions like BlueMarble, iiPay, Vistra, or SimplePay. Alternatively, you can always use a local accountant in that country.

Service Features

MANAGED SERVICES

Whether you're outgrowing your current PEO or working as an army of one, there are ways to make your life easier. Some payroll platforms also offer fully managed services designed to remove the burden associated with day-to-day payroll administration.

Managed payroll services take on the tasks associated with payroll processing so you can scale your business and focus on strategic people initiatives. These payroll providers can bring you the software and compliance expertise you need to feel secure, while giving you complete autonomy over your payroll policies and schedule, as well as your chosen HR technology. They can serve as consultants and help to streamline your core payroll functions, saving you time and allowing you to orchestrate from behind the scenes, without doing the manual work.





The Buying Process

The Buying Process

When considering a task like purchasing new payroll technology, it's easy to get overwhelmed.

So what's the best way to tackle it?

The key is to break up your search into smaller pieces. Once you do that, the evaluation starts to run a lot smoother.

The typical process for buying any payroll technology has 5 defined phases: Internal Alignment, Shortlisting, Evaluation, Selection, and Implementation.

To help you kickoff your buying process, we've broken down each of these phases and included a checklist for you to use:

INTERNAL ALIGNMENT

The first step to investing in payroll technology is to look internally. In the Internal Alignment phase, you need to think about everything you want in a software, as well as any problems you'd like that software to solve.

Knowing what you're looking for will help you build out a business case that you can take to your company's leadership. While you can always get their buy in later in the process, it will make it significantly easier if you know you have their support from the very start.

Checklist:



Make a list of your needed and desired payroll software features.



Build a business case.



Get buy-in from senior leadership/stakeholders.

The Buying Process

SHORTLISTING

Now that you have aligned internally, your next question should be which payroll tech companies you should talk to. When looking at the market broadly, it can seem intimidating and over saturated. There are so many systems out there, it can be really hard to know the market and narrow it down.

Luckily, there are a couple ways to shorten the marketplace:

1. Look at payroll tech companies' websites for missing functionalities

- a. Here are some questions to ask yourself: Do they offer the modules and functionalities that I want? Do they check the boxes for the list I created in the Internal Alignment phase?

2. Determine size match

- a. Some payroll technologies are built to support small companies. Others are built to support massive conglomerates. You need to determine which one is the best fit for your size. One way to do this is to look at some of the clients listed on the company's website or the size of the clients reviewing the tech on sites like G2 or Capterra.
- b. Here are some questions to ask yourself: Are those companies close to your size? Does the company say they are built for a certain size company.

3. Look for market presence

- a. You do not need to be with the biggest payroll software—especially if you're a small or mid-sized business. But the companies you evaluate should still have a market presence. To determine this, you can simply conduct a Google search to see when they've been mentioned in the news, check the number of reviews they have on review sites, or even look on LinkedIn to determine the number of employees that they have.

Checklist:



Make a list of your needed and desired payroll software features.

- Look for functionality fit
- Determine size match
- Examine market presences



Narrow down your search to 2-5 companies.

The Buying Process

EVALUATION

Evaluation is perhaps the most time-consuming step in the payroll technology buying process — but it's also the most important.

During this phase, you should evaluate no less than 2 companies, but no more than 5. Only evaluating one company doesn't give you a good enough idea of what's out there. Evaluating more than five will leave you burned out and confused between systems.

To keep this phase as straightforward and organized as possible, you need to create a standardized way of evaluating demos in a way that doesn't completely monopolize your already busy calendar.

So how do you prepare for a demo?

1. Be organized and do your homework

- a. Know who you're talking to. Look at each website and come up with questions & scenarios you want answered during each demo. This should help you feel like you're driving the discussion, and it should ensure that you're seeing every feature you'd like to evaluate.

2. Build out a scorecard

- a. During the Internal Alignment stage, you've already taken the time to determine your key buying criteria and functional needs. Now, it is important to keep those priorities top of mind when evaluating those vendors. Create a basic scorecard in Excel that allows your stakeholders to score each category; you can even weigh certain criteria more than others to allow for a more accurate decision.

3. Think about who needs to attend the demos

- a. You don't need to invite everyone in your company to attend a demo. In fact, it's important not to have too many cooks in the kitchen. But you do want to make sure you have everyone there that needs to be.

Checklist:



Using your shortlist, schedule 2-4 demos. Look for functionality fit.



Prepare for the demos:

- Look for functionality fit
- Determine size match
- Examine market presences

The Buying Process

SELECTION

Okay, so you've picked your favorite payroll technology? Now what?

The Selection phase is typically where you need to start getting other teams, like legal, IT, and finance, involved.

Once you've received a contract from the payroll tech company, you need to review it with your legal team and give any redlines back to the vendor. You'll also need to get final budget approval from your finance teams. It's also important to loop in your IT team, who can scope out integrations and security.

This phase may seem tedious and full of back-and-forths, but the good news is: you're almost ready to implement your new software!

Checklist:



Review, edit, and finalize contracts with legal.



Get final budget approved.



Loop in IT to scope out integrations and security.

The Buying Process

SELECTION

Congrats! You've invested in new payroll technology.

Your life is about to get a whole lot easier (and your employees will love you for it).

Now, you just need to turn on the system. This will mean building processes so that the system is attuned to your organization and how you want to use it; most of this will likely be handled by the payroll tech company. But it's important to understand and have a say in how your system is configured.

The first key to a strong implementation is simply making yourself available for the process. You may be asked to pull reports, download data, and map out internal processes. All of these steps will require a time commitment from you and your team, but if you can make yourself available to your new partner, your new system will start to reflect the vision you hoped for.

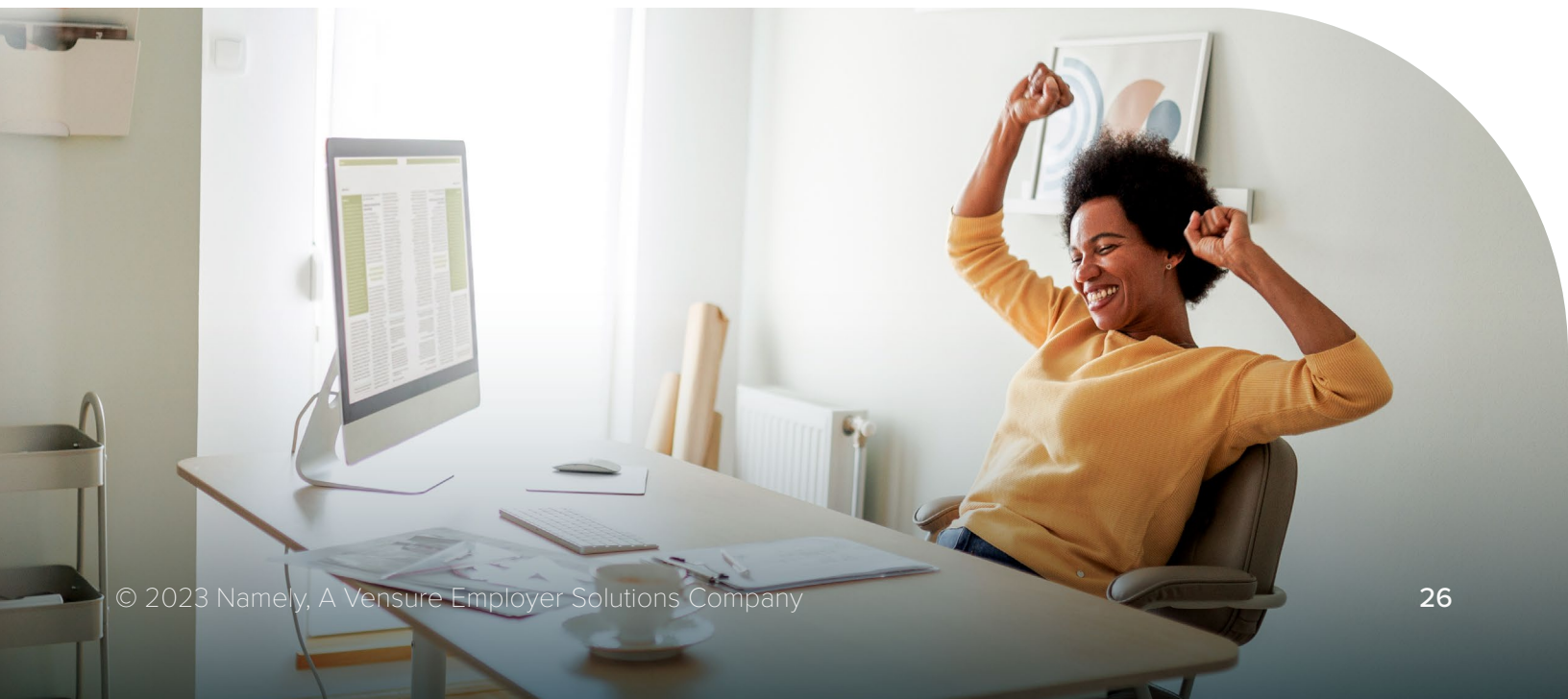
Checklist:



Convert your data.



Test and set live!





Conclusion

Looking for new payroll technology can seem daunting — but it doesn't have to be. By understanding what features and services payroll software has to offer and tackling the buying process head on, you can say goodbye to manual processes and add time back to your day.

[We'd love to chat!](#)

About Namely

Distinguished by its intense commitment to diversity, equity, and inclusion, HR technology leader Namely is an employer of choice that helps mid-sized employers and their employees thrive. Delivering and streamlining the complexities of recruiting, onboarding, time & attendance, performance management, benefits administration, compliance, payroll and analytics from a single platform, Namely also offers Managed Payroll and Benefits services. The company further differentiates the client experience through personalized service and easy-to-use applications.

Learn more at [Namely.com](https://www.namely.com) and stay in the loop by [subscribing](#) to our newsletter!

