

HRMS IMPLEMENTATION

9 STEPS TO SUCCESS

Your exclusive guide to HRMS implementation planning and execution

GUIDE HIGHLIGHTS



Planning change management and HRMS user training



Executing data migration, system testing and more



Measuring implementation success after go-live





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PLANNING THE IMPLEMENTATION

While the sheer number of different HRMS solutions, modules and integration options makes the selection process a somewhat daunting experience, the upside is that the perfect system for your organization's unique combination of staffing, structure and services is almost certainly out there somewhere.

However... selecting the right software is only half the battle. In fact, sometimes it's only a preliminary skirmish!

Indeed, you may have found an HRMS that fits your organization's needs like a glove, but if your implementation process is less successful you run the risk of – let's be blunt – handcuffing your organization to an expensive technological ornament, taking up server space.

A SYSTEMATIC IMPLEMENTATION

The key to effectively implementing your new HRMS is to be systematic. Take it step by step, and – like any change initiative – involve the right people at the right time. There are nine steps to success:

1. Planning the implementation
2. Change management
3. Hiring a consultant
4. Data migration
5. System testing
6. User training
7. Go-live
8. Post go-live challenges
9. Measuring project success

Although some of these stages may be carried in a different order, or even simultaneously, the first step – and hopefully, this is no surprise – is good planning.

So, given the above steps provide nine clear project elements that must be carried out, the first question is, who should you involve in planning these elements? Broadly speaking, the stakeholders include anyone who has an interest in, and/or an influence over the project. The usual candidates include:

- **C-suite:** concerned with the return on investment, the impact on workplace efficiency, cost savings, and, when it comes to using the HRMS, having strategic reports and analytics that make a genuine difference to the running of the organization.
- **HR team:** the pressure is on your HR staff from the start. Everyone will expect them to be experts in the new software, yet it will be as new to them as everyone else. HR will mainly be looking to realise time-saving efficiencies from the system.
- **Users:** mainly interested in the impact on the service they receive from HR and the system's ease of use. They may also have concerns about the system's ability to improve (or otherwise) fundamentals such as payroll accuracy.

Put simply, your planning process should invite input from these and other key groups and functional areas. By understanding their specific concerns you'll be better able to engage with them and even whip up some enthusiasm for the all-singing, all-dancing system you're hoping to implement.

OBJECTIVES, DELIVERABLES AND MILESTONES

The key output of the planning stage is, of course, a project plan that addresses the needs of stakeholders and clearly identifies every task that must be accomplished for the above nine steps, and by what date. In other words, it will include measurable and realistic objectives, key deliverables, and milestones.

You may also decide you need a dedicated project team to carry out the plan, likely to include in-house staff members with appropriate skills, but possibly also supported by an external HRMS consultant (see step #3). Depending on the size, scale and complexity of your organization, you may choose to establish a separate project board to handle the decision-making and 'big picture steering'. After all, you wouldn't expect to see many members of the C-level working on the detailed project tasks, but you can more easily entice some C-suite representation onto a project board or committee. Such representation is two-way: it gives the top level some hands-on control over the project, but it also gives the project a direct line to the top level.



CHANGE MANAGEMENT

There are a lot of statistics floating around of various validity, but the general consensus appears to be that HRMS implementations often fail to live up to their expectations. Regardless of the exact failure rate, the important question is why? Why, given the effort, due-diligence and investment, do so many HRMS projects ultimately disappoint? The answer lies in the component of a software implementation most often neglected: people.

People have a natural resistance to change – all change is a loss of the familiar and even if that familiar state isn't positive, it's still a loss and people react accordingly: denial, resistance, exploration, acceptance. The impact of change on the people working in an organization cannot be underestimated, especially in terms of how that impact can affect the success of the change in question. To guarantee an effective HRMS implementation, your process must take into account how the people in your organization respond to change. Two models can help that understanding.

THE CHANGE CURVE

A number of business applications have been made using the research of Dr. Elisabeth Kübler-Ross, who found that people faced with significant change pass through a number of distinct emotional phases. Having a structured model means that communication and engagement strategies can be formulated based on a predictable response path resulting in a process that looks similar to the one below, based on the Lewis-Parker change curve.

Shock: the employee realizes that something is changing; a brief period of disorientation and a lack of logical reasoning is normal.

Minimising impact: certain user groups may seek to ignore the new HRMS by labelling it an HR issue, nothing to do with them.

Frustration: the change is accepted but the person still doesn't like it; feeling hard done to and uninvolved.

Letting go: at this point, the person is beginning to look forwards and is considering the change.

Testing the limits: the training is under way and the person has the opportunity to learn about the system and apply their new knowledge.

Search for meaning: with use comes a wider understanding of what the system offers in terms of benefits.

Integration: the new HRMS isn't "new" anymore; it is accepted as the norm.

ADKAR

Knowing the stages people go through when faced with change is useful, but for successful implementation, you need to know how to move people around the curve as quickly and painlessly as possible. This is where a practical model such as Prosci's ADKAR methodology comes in. ADKAR suggests five key stages of change management, each with its own strategy.

Awareness: people need to be aware of the reasons for the change, the bigger picture.

Desire: people then need to feel motivated to want the change (either because it is so attractive or because the existing situation is unattractive, or both).

Knowledge: this is the skills analysis part of the training strategy in implementation, people need the knowledge and skills to be able to use the new system.

Ability: knowledge is one thing, being able to apply it is another; people need further support to put their new HRMS skills into practice.

Reinforcement: if people are not rewarded for their movement towards the desired change, they are more likely to revert to old methods and patterns of behavior.

People's attitude towards the HRMS will greatly influence the success (or otherwise) of your implementation process. An effective change management strategy that takes these two models into account could be a critical success factor in embedding your new HRMS into the organization's ways of working.



HIRING AN HRMS CONSULTANT

Implementing HRMS entirely in-house is perfectly achievable; handling the technical installation, data migration, integration with other systems as well as user engagement and training can be done in-house by your team alone. However, despite the daunting hourly or daily rate, an expert HRMS consultant can prove to be value for money if they keep your HRMS implementation on track and deliver on your agreed go-live date. The key issue is picking the right one.

An HRMS consultant can make your life easier by taking care of complex or cumbersome tasks or being a skilled set of hands during a busy period. However, an HRMS consultant can cause negative impacts to your budget or business processes if they are not efficiently deployed.

When hiring expert help, you need to be reassured your HRMS consultant is truly an expert. What experience do they have implementing HRMS? Do they specialize in HRMS or do they consult on a variety of topics? In essence, do they have specific, specialist knowledge currently lacking or underrepresented in your team? Ideally, you're looking for an HRMS consultant who has handled dozens of HRMS implementations and understands the capabilities of such systems inside and out.

COST, THE BOTTOM LINE

Price should not be a sole deciding factor, however, of all the people involved in your HRMS project, the chances are that your HRMS consultant has the highest hourly or daily rate pro-rata and if project delays set in you will quickly see your budget leave your forecasts behind. Some advance planning can help here: agreeing the scope of each project element with the consultant, and also negotiating either a fixed project price or a capped daily fee can help keep a lid on cost when the unexpected happens.

The advantage of this added cost is that an HRMS consultant can analyze your processes and recommend improvements that will save you money. A consultant's cost should be reviewed to be sure that you're getting the most advantages from what is often a costly line item on any budget. Define your work efforts so that your consultant is a cost benefit to your organization.

REFERENCES

You wouldn't employ someone without first checking their references, so why treat the recruitment

of a consultant any differently? Given the pivotal role an HRMS consultant can play (and should play) you must conduct in-depth conversations with the clients your prospective consultant is offering as references. The key issues to explore are: scope of the project, budget performance, was the go-live deadline met, ROI performance, any post-implementation issues, and generally what problems arose and how did the consultant tackle them. All the time, you're looking for high performance in an environment similar to your own.

EXPERT ADVICE FOR COMPLEX PROCESSES

Some HR processes happen on an infrequent basis. Annual enrollment and government requirements like EEO or ACA reporting require a high level of detail and attention. An HR team who only performs these tasks once per year may take extra time and effort or miss some of the new legislation. An HRMS consultant who regularly does these processes for companies is on top of the regulations and can deliver results. An added benefit of using an HRMS consultant is that they may absorb the risk element as some contracts include coverage in if there is an audit or if something goes wrong with the reports.

IMPARTIAL INSIGHT

A consultant can provide impartial insight when you're facing a highly political situation like defining the future HR department structure after a merger an HRMS consultant can remove the stress. A neutral and unbiased opinion is helpful in strategic system discussions. Your current HR staff sometimes view work through the local impact to their roles but an outside expert can analyze and present options without history or politics.

Ultimately, whether to bring in an HRMS consultant may depend on the scale of your project and your business. If your new HRMS is a glorified database tracking 50 sets of employee details, then clearly a consultant would be an expensive conceit. However, hundreds of employees across multiple sites in multiple roles, and a system that is expected to talk to ERP, CRM, and payroll software may indicate you need all the expert help you can get. In which case, choose wisely.



DATA MIGRATION

In many ways there is no such thing as a good time to implement your new HRMS. There may be worse times of the year – for example, performance review season, or year-end for payroll functions – but when you're faced with the prospect of transferring the personal data of every member of staff from one system to another, there is unlikely to be a period of time one could safely describe as "good". And yet it is the data that is key to the effectiveness of your HRMS.

Your new HRMS is only ever going to be as good as the data it contains. After all, you can buy the most advanced analytics functionality in the world but if it's working with inaccurate HR data, the insights it can provide your HR team will be limited at best, and false at worst.

PLAN YOUR DATA MIGRATION PROCESS

No aspect of your HRMS implementation should be done on the fly, least of all any data-related activities. Lay out the individual steps needed, then consider timings and who will take responsibility for carrying them out. Do not underestimate the time that data migration can require.

ENSURE YOUR DATA IS ACCURATE

Accuracy is an important factor. In any data transfer process, information can become corrupted by either system error or human error. A wrong digit here or deleted detail there and someone either doesn't get paid that month or perhaps their pension statement is sent to the wrong address. This can be a particular risk when transferring HRMS data from one system to another. The greater the differences between the systems, the greater the potential incompatibilities, and the greater the possible error rate. The goal is for the data in the new HRMS to be at **least** as accurate as that in the old.

CLEANSE OUT-OF-DATE HR DATA

However accurate and complete you think your current database is, a change of HRMS is the perfect time to review the information it holds. After all, this information will inform pay, terms and conditions, time and attendance records, succession planning and talent management. Identify all gaps in your database and fill them. Check the accuracy by asking individuals to view and update

their own personal data - this also engages users in the project, heightening their awareness of the impending change of system. Alternatively, it could be the test exercise for the HRMS employee self-service functionality: requiring everyone to check and, if necessary, update their own record.

RUN A PRE-MIGRATION TEST

Before you entrust your precious HR data to its new home, run through the standard functions and processes using either dummy data or a sample selection of real records. This is basically a case of checking the integrity of the basket before you put your eggs into it, and can throw up the need for some basic fixes before you proceed.

SECURITY

HRMS data security is also a fundamental issue; especially if your new HRMS is taking you into the cloud. After all, if you are buying this software as a service (SaaS), the HRMS vendor may well have it installed on a platform as a service(PaaS) from another provider, who might be renting infrastructure as a service (IaaS) from yet another. And the IaaS provider might be using part of a shared data center. If you don't know where your HRMS data is (although any SaaS vendor should be happy to tell you) then how do you know it's secure?

The data in your HRMS is the foundation of strategic insights and decisions, of good management, of employee trust in their employer. Knowing that it is accurate and secure is essential.



SYSTEM TESTING

Once your shiny new HRMS system is full of shiny new data (or more accurately, the old data after it's been cleansed, checked, fixed, etc.) it may be tempting to imagine that the onerous technical tasks are complete and you can shift to contemplating the joys of user training and engagement. Not so. First you must face arguably the biggest hurdle for the technology itself: system testing.

System testing is an important part of any HRMS implementation or upgrade. If you miss to find data errors or problems in workflow it can cause questions and embarrassment. Mistakes can potentially be costly if they are in a financial area like payroll, benefits or stock administration.

BETA TESTING AND BEYOND

In the 'Information Age' of internet and apps, most of us are familiar with the term 'beta testing'. Well, if you really want your HRMS implementation be as smooth as possible, it's worth considering gamma, delta and epsilon testing as well (don't worry, they don't really exist; I am just making the point that your system testing should be rigorous.)

After all, an HRMS will contain confidential personal details of all employees and quite possibly, if there's a payroll module, social security or national insurance numbers and bank account data. There's no such thing as an inconsequential error or problem.

DEFINE A TEST STRATEGY

Testing is an area that sometimes gets overlooked. During implementation projects, it occurs at a later stage when the team is already busy with multiple tasks. Post go-live testing is still a concern when operational teams get competing priorities. It's essential to create and follow a test strategy for project tasks and then ongoing maintenance and enhancements. Will you use an automated test tool? Should you bring in an HRMS consultant as your test lead during an implementation? It's a best practice to have one document that outlines a general strategy and how these tasks will be accomplished.

DEFINE ROLES AND RESPONSIBILITIES, AND IDENTIFY TESTERS

Everyone on the team should be clear on what functionality is being tested and who has responsibility for each part. Make sure that you avoid assigning those who have a lot of HRMS

knowledge too many project tasks, then 'unofficially' assigning them to do testing as well. Testing is time-consuming and the hours should be formally acknowledged, assigned and accepted.

A SCHEDULE FOR TESTING

As an addendum to your main implementation plan, draw up a schedule of testing for configuration and system setup, integration with other business intelligence systems, processes and procedures, and (especially for payroll) parallel running with whatever system you were using before. Put the same data and instructions into both and if the new system isn't faster and/or more accurate then you have to ask: why not?

Some tests will be functional (input data A, or instruction B, and expect to see output C...) others will require representative user groups to test the system if not quite 'to destruction' then at least to the limits of its capacity.

Finally, don't forget to check the reports and analytics that the new HRMS is expected to churn out. Assuming you're installing a system of greater capabilities than its predecessor then some of these functions will have no prior benchmark for comparison. In that case, refer back to the business objectives and strategic goals that such functions are expected to support (they should be clearly defined in the original business case that started the whole HRMS acquisition process) and see whether those expectations are being met.

WHEN IS TESTING OVER?

After each round of tests, expect to have identified a set of problems which will then require technical or procedural solutions. In fact, if no problems crop up, be very suspicious! Having resolved the identified issues, test again.

Implementation testing should reflect the entire employee lifecycle from recruitment through retirement and everything that happens in between. Processes should be tested both independently and as a part of the whole picture. A basic HRMS test may be to promote an employee in the system. Check if the system allows you to complete the transaction. Then you need to test the downstream events that should be triggered by this process.

If you're tempted at any point to skimp on the system testing regime, just remind yourself that first impressions are critical and the less testing you do, the more likely it is that your new HRMS will fall over during go-live. If a user's first experience is a failed login, crashed routine, or just inaccurate data, you've just destroyed their faith in a system that will be storing their personal information, tracking their performance and rewards and managing their salary. Not the best start!



USER TRAINING

One of the factors that makes HRMS implementation such a challenge is that everyone in your organization needs to be able to use it. It may perform a variety of highly-specialized and specific functions but the cadre of users couldn't be less specialised; at the very least, every single employee needs to be able to login and handle the routine personal data management tasks that are designed to free up your HR staff for more demanding work.

Add to this the reality that any change to an IT system is by its nature a de-skilling process, with users having to re-learn once-familiar tasks, as well as getting to grips with new functionality (just consider the frustration you experience every time Facebook or WhatsApp updates its features), and it's obvious that user training is a make-or-break part of your implementation success.

USER GROUPS

Of course, just as there are different stakeholder groups, so there will be different user groups (in fact, the two groups often by and large mirror each other). The "users", whose training and instruction you need to consider, generally include the following as a minimum:

- The Executive or C-level users, who'll need to access HR analytics and strategic level reporting features.
- Line managers, who'll be focused on employee record keeping, workforce scheduling and leave management, recruitment and onboarding, and performance management tracking.
- Individual employees (the 'workers'), who'll need to know how to access to their own personal records and keep them up date, book/request time off, make benefits choices, etc.
- HR staff, who'll need to be able to advise everybody else, carry out various statistical and strategic number-crunching, and so on.

DESTINATION, CAPABILITY, LEARNING, EVALUATION

In terms of the training process, it's no different to any other upskilling project. First, establish what you need each group to be capable of doing. This is the 'destination' and should be determined by (or at least linked to) the overarching business objectives that the HRMS is intended to support.

Second, find out what users are capable of doing now. In other words, where are they now? You

don't want to waste time on training materials for anything they already know, but equally you can't risk making any false assumptions.

Third, design appropriate learning interventions to take each group of users from their current state to the desired destination state.

Next, deliver that learning solution. Then, evaluate it. Tweak/amend/redesign it as necessary (maybe even start all over again in extreme circumstances). Finally, review progress and readiness for go-live.

The main message here is not to underestimate the importance of user training to your HRMS' ultimate success. Hitting your go-live target date is hugely desirable in terms of being seen to deliver what you promised. However, staging the big 'switch-on' in line with the original timetable at the expense of users' ability to utilize the system is a false victory. Effective and targeted user training doesn't just enable everybody to use the system effectively, it also demonstrates your commitment to providing a system that will actually be of value to the organization and to the individual. That's the kind of engagement you don't want to compromise on.



GO-LIVE

Let's be clear, go-live is not the hallmark of a successful HRMS. Using the software in a way that enhances your organization's business and the working lives its employees... that's success. That said, a smooth go-live is one sign of a successfully-run implementation project (which, let's face it, is no small achievement).

So, all your preparation has been done. You've engaged with stakeholders according to their needs, concerns and requirements. Senior management are behind the system and singing its praises to anyone who'll listen. All users have been trained and evaluation and feedback has been positive (in other words, they now have the skills and awareness to use the system). The system itself has been tested and retested, and the data has been cleansed, transferred, checked, and quite possibly checked again. There's only one thing left to do and that's to switch it on and start using it for real.

THE "PRODUCT LAUNCH" EQUATION

If your implementation has been planned meticulously so far, now is not the time to alter this approach. As with any 'product launch' every aspect of the users' first experience should be considered and planned. From a checklist showing key activities and responsibilities (another addendum to your overall project plan) to a detailed risk assessment that identifies everything that could possibly go wrong. And, the other half of that equation, a contingency plan that tells everyone what to do should any of those risks occur (and some of them will, you can count on it).

A big part of that planning is to establish what support – visible and otherwise – will be available for users. Any number of options are available and the support you offer may include:

- **JIT guides:** 'Just-In-Time' training describes any material that is available on demand and is designed to be used immediately. In other words, it's for those frustrating yet inevitable moments when even the most well-supported user realises that they can't remember X or Y from the training programme and needs a refresher there and then.
- **Super-users:** some users are always more involved in the project than others and as a result have a better and more in-depth understanding than average. Maybe they were a user representative on the project committee or in a round of engagement focus groups; maybe they are just gifted when it comes to the use of IT and technology. Either way, people like this

are ideal candidates to be on hand for colleagues to answer queries and offer solutions to problems (the human equivalent of JIT training).

- **Automatic reminders:** for example, when each person logs onto the corporate system, an automatic window pops up to remind them that the new HRMS goes live today and reminds them of a few key points for successful use.
- **Technical support:** of course, this should be on standby, more so than a regular day because if a hardware or software problem does occur, it should ideally be solved instantly, if not before!

Finally, don't forget to make arrangements for bug and glitch reporting. Problems are irritating to experience, but if there's a clear channel to report an issue which results not only in a rapid solution but also feeds into improving the system for the future then the chances are that 'irritation' won't then mature into frustration or even disengagement.



POST GO-LIVE CHALLENGES

Hopefully you had a successful go-live and the launch of your new HRMS went like clockwork. Of course, we all know that just because something works when you switch it on, doesn't necessarily mean your work is done. As well as long-term post-launch and maintenance activities ahead, there are tasks to address in the immediate aftermath.

THE BASIC QUESTION

First of all, look at how well the system is functioning. The basic question is, naturally, is it working? But let's break that down into some specifics:

- Are the features functioning as expected?
- What errors are occurring and are they within the expected margins?
- Were the bugs and glitches fixed within the desired timeframes? (And, are the fixes being applied with the longer term in mind?)
- How did data integrity stack up against expectations?
- Is the system working with other integrated databases and systems as expected?
- What 'quick wins' are emerging? And can you announce them so that you have some early positive news to give out?

MEETING NEEDS

Second, turn to your stakeholders. You did a lot of work early on in the implementation project to identify the different stakeholder and user groups and establish their concerns, needs and requirements. The question now is, are those needs being met? It may seem early to ask this question – and certainly it won't be the last time you ask it, it should be central to any system evaluation, at any stage in the HRMS life cycle – but if there are any teething troubles, spotting them early gives you a chance to nip them in the bud before they become a serious project risk.

TRAINING GAPS

Thirdly, what about training? The pre-go-live workshops, coaching, how-to guides, podcasts, etc. may be behind you but the same probably can't be said for users' training needs. Now that your

employees are using the system on a regular basis, what fresh training gaps are you identifying? If they're saying, "I wish they'd told us about X," then you absolutely need to know what 'X' is!

SUPPORT DELIVERY

Fourth, take a view on whether it's time to let go of your external support. It largely depends on the initial success of the system, and what – if anything – you contracted external help to provide. But if you have engaged an HRMS consultant or paid for extra support services from your software vendor, now's the time to realistically assess whether there is a continuing need or not.

Finally, review the launch: what worked, what didn't, what could have been done better and how. As with any event, it's a case of review, record, and remember. After all, the learning will likely come in handy for all kinds of future projects and not just the next time you have a new HRMS to implement.



MEASURING PROJECT SUCCESS

At the end of your HRMS implementation, as with any other project carried out in the workplace, the key question is, how did we do? Was the project a success? If some elements didn't go according to plan, why not? Whether it all worked perfectly or not, what could have been done better, and how?

WHY GO TO THE TROUBLE?

To be clear, this post-implementation project review is a different exercise to measuring the return on investment of the HRMS system itself. The focus here is on the process of implementation.

"relying on anecdotal feedback, or a gut feeling, or surface appearances rarely gives an accurate indication of success. "

Why go to the trouble? Because relying on anecdotal feedback, or a gut feeling, or surface appearances rarely gives an accurate indication of success. A structured, objective review on the other hand – even if it does add time and resources to the overall project costs – will not only give a true picture of the implementation process but also feed into your future HRMS usage and development strategy.

THE BOTTOM LINE

Firstly, let's go straight to the bottom line and ask about costs and benefits. What were the final overall costs of the implementation? This includes the up-front system costs, any hardware or supporting software costs, the time taken by internal personnel in all roles (i.e. not just the project team but all staff time spent on implementation activity), external consultancy costs, any materials needed to support a successful implementation (e.g. training).

Having established a figure or two, ask how those costs compare with the benefits being achieved so far. Certainly, the balance of these two factors will shift over time (hopefully in the favour of the "benefits"!) but as an indicator of how quickly a full ROI might be achieved, it's never too early to start gathering the facts.

The value of the benefits should continue to increase and after a certain point, not only will the benefits be worth more than the cost but that value for money should only continue to increase. The bottom line output is a statement of the final costs of implementation plus the ongoing operating costs to date compared to the value of the benefits realized.

THE PEOPLE FACTOR

As well as cost, the other major factor is the people involved. What are the opinions of the various stakeholder groups on the implementation project? Do they feel they were sufficiently involved? Listened to? Have the benefits and efficiencies they were promised transpired yet? What about the impact on indirect stakeholders such as customers, suppliers, and even government (e.g. in relation to employment legislation compliance)?

Similar to taking time to review the planning of the go-live and launch, ask questions about how well the implementation process was managed and directed.

- Are there any learning points for future projects?
- Did any unforeseen pitfalls or delays occur? How were they mitigated? Could they have been addressed more effectively?
- And of course, what went well? How could you repeat these success factors in future projects?

FUTURE STRATEGY

Finally, looking ahead to the longer life of the HRMS you've just (successfully) implemented, what issues can be fed into your HR technology strategy? For example, users may have asked for additional functions which could be provided by additional software modules or upgrades. It may not have been appropriate to include them in the initial implementation (too much = too risky in project terms) but in the future, who knows?

In addition to assessing the project's success, this post-implementation review gives the first in-depth snapshot of how the HRMS is delivering on its anticipated business and strategic benefits (as identified in the initial business case) and as such is a valuable exercise to maintain the support and engagement of key stakeholders and decision-makers.

This guide was written by Dave Foxall, HRMS World Columnist, with contributions from Richard Barker, HRMS World Content Editor

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