Data Conversion Services

A New Way To Onboard

Onboarding to any new software can be scary, so it's no wonder service bureaus delay switching platforms. But Apex HCM customers often discover the fear is far worse than the reality. This Customer Success Story (CSS) focuses on some of our most recent converts to the Apex platform. They shared with us their past experience with software conversion and onboarding, in comparison to their recent experience with the Apex HCM Implementation Team. As new payroll software requires converting and importing your existing client base, Apex HCM created three levels of conversion services: Self-Service, Kick-Starter, and Full-Service. Depending on the amount of data, the complexity of your payroll clients, and the speed you need to onboard, determines which process best fits you. Many new Apex customers choose to convert on their own via Self-Service. This option works best if you have available staff to accommodate the time to convert the data. Kick-Starter and Full-Servcice however, provide you access to Apex HCM Implementation Team specialists.

Kick-Starter

Sharon Downing, Director of Payroll Services for Integra Business Solutions in Wyomissing, PA thought through the conversion process and realized she had some available resources but not enough to quickly and efficiently onboard to the Apex HCM platform. As a result, Sharon opted to utilize Apex's Kick-Starter program. Kick-starter provided Sharon access to the Apex implementation team via phone and email, as well as other Apex internal resources for data entry. Sharon recounts her onboarding experience with Apex HCM Kick-Starter program, "It was really more like a friendship than a business transaction and just formed naturally due to the helpful nature of the Apex team." Downing recounted how the process of converting from one platform to another was completely overwhelming. But the Apex team responded quickly. "Sometimes Apex even called just to walk me through a single step! I mean their response times were nothing short of excellent, especially considering all the moving parts and investigations possibly needed to answer the questions." The Kick-Starter program offers Apex data entry assistance to new customers who need more help than standard self-service conversion. "Converting is not really designed to be a 'plug and play' sort of thing by nature, you know? But the Apex training was amazing, the response times were amazing, and the general process was very smooth."

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Full-Service

Deborah Grandinetti, President, Payroll Providers, Santa Clarita, CA knew she needed more assistance than the Kick Starter program. Given her large client base and limited amount of time, Deborah opted for the Apex Full-Service approach. The Apex conversion team converted 600 payroll clients to the Apex HCM platform in just 4 short months. Deborah reflected on the conversion experience, "We'd actually had numerous conversations over the years and had been considering Apex for a while. To be honest, we actually selected and began converting to another software platform before coming onboard with Apex. But after 4 months we suffered so many problems and only successfully migrated 20 clients, so we decided to abandon that platform and instead implement Apex HCM."

Deborah's experience with conversion failure unfortunately occurs too often in the payroll industry. Deborah adds, "I think if you're not 100% certain about the software you're converting to, you just shouldn't. If you don't know the conversation process and all the issues, it can take 1 or 2 years to convert. That's a painful number to hear as a business owner. So make sure you're absolutely invested and knowledgeable in the platform you're converting to. All we did was create the file, then Apex took the file and onboarded! All in all, the implementation team did about 90% of the conversion and we were just left to do the little things that were very specific to each client. They were so helpful in getting us up and running – everyone we spoke with was able to get what we needed answered and the team was just a great asset in the process."

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