

Leveraging Employee Self-Service for Competitive Advantage

A guide for CPA firms and
Payroll Services Bureaus

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The rise of employee self-service

Self-service is a trend we are seeing across all sectors, giving individuals the ability to perform tasks that previously had to be done for them. Now, we no longer give our fast-food orders at the counter; we use a screen, and visitor digital sign-in has become the norm for many businesses.

Self-service is also changing the way payroll and HR interact with employees. As a Certified Public Accountant Firm (CPA) or Payroll Services Bureau (PSB), you need to be able to provide this service to your clients and use it for strategic advantage.

Employee Self-Service (ESS) is not merely a trend but a reflection of the modern workplace's growing demand for autonomy, efficiency, and transparency. At its core, ESS is designed to empower employees by giving them direct access to their personal and employment-related information, including payroll, benefits, and time-off requests, through a secure online portal.

This shift not only enhances the employee experience but significantly impacts organizations' operational efficiency, streamlining many of the once-complicated processes and reducing the number of employee requests that take up valuable resources.



For accountants and CPA firms, adopting and integrating platforms and software with employee self-service functionality for their clients represents more than a technological upgrade - it is a strategic move towards offering more value-added services, improving client satisfaction, and gaining an edge in a highly competitive market.

In this guide we will look at the benefits of employee self-service for employees, employers, CPAs and PSBs and how it can be a transformative change for your firm.



Understanding Employee Self-Service

Employee Self-Service refers to a suite of digital applications allowing employees to access, manage, and update their employment-related information directly. There is no fixed list of what tasks ESS can cover, but the most common tasks include viewing payslips, submitting time off requests, and updating personal information such as address or bank details.

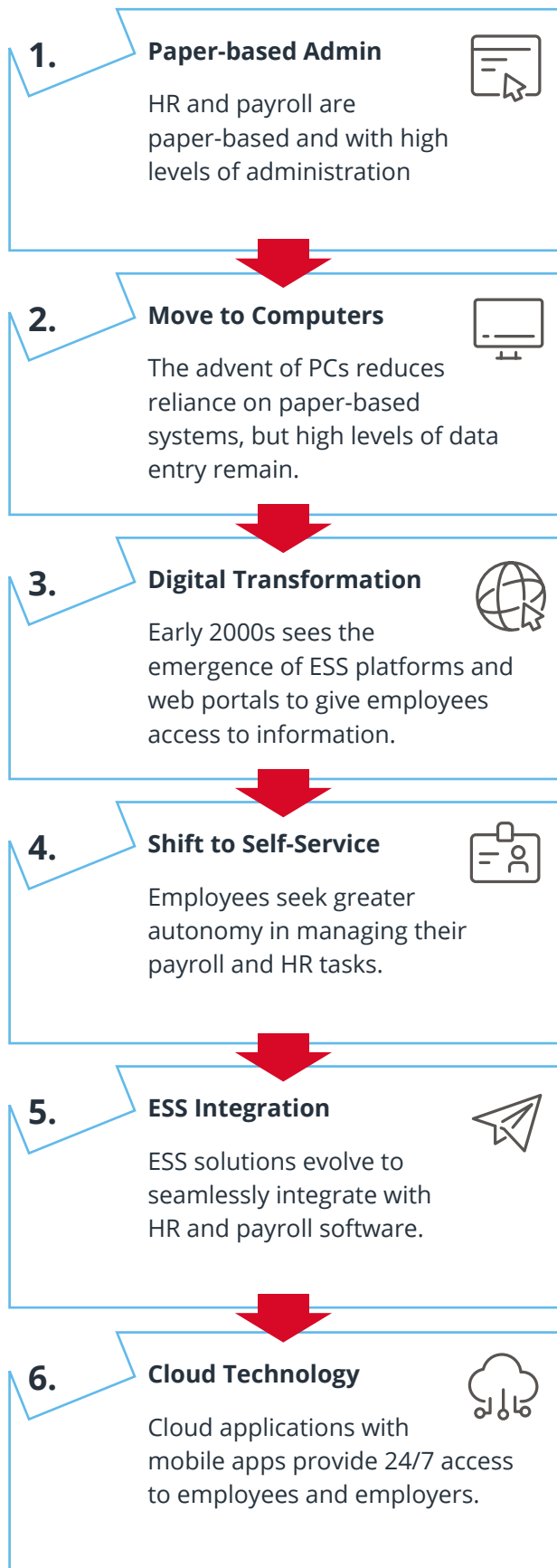
If this doesn't appear groundbreaking, look at it from the employee experience of the days before self-service. Imagine you work at a company and want to check your last few paychecks, request some time off, or change your tax withholdings. Instead of having to email HR, wait for them to get back to you, fill out forms, and then wait some more, you log into an app from your cell phone at a time that suits you, and all it takes is a few clicks.

Where did ESS start?

HR and payroll tasks started as paper-based which took up a great deal of administrative time. Then along came computers and it made things a bit easier, but you still had to go through HR, the payroll team, or your manager for everything. The introduction of ESS allows employees to complete many tasks simply and securely. It's a big win for employees because it is convenient, and through secure cloud apps, they have access whenever they need it. It's a win for companies because it cuts down on the admin tasks generated by employee requests.



The history of ESS



What are the most common Employee Self Service tasks?

Time and Attendance Management

Employees can clock in and clock out and record their hours and attendance. Some systems also have GPS location tracking for greater accuracy.

The ESS platform allows employees to make different types of leave requests (vacation, sickness, etc.) and for managers to approve or decline these requests through the portal.

Access to Pay Information

Employees can see their pay and tax information and download key documents such as pay stubs and W2s.

Updating Personal Information

Employees have control over changing and updating their personal information, such as contact details, emergency contacts, direct deposit and tax-related information.

Benefits and Compensation Information

Employees can see details about benefits and (depending on the ESS platform) make benefit selections.

Training

An ESS platform provides a central location for employees to manage their training and compliance.

HR Tasks

ESS can become central for many HR processes, such as new hire onboarding, a repository for company documents, and a channel for communicating with employees.

The Importance of ESS for CPA Firms and Payroll Services Bureaus

ESS systems are not merely administrative tools for accounting and payroll services professionals; they can contribute to business success and provide a competitive advantage over rivals.

The benefits of self-service

For CPA firms and PSBs, ESS is important for several reasons;

1. Streamline processes

Payroll and HR tasks are labor-intensive, so any time savings in this process are a win for the business.

Giving your clients and their employees the ability to view data, access reports, and make some changes reduces the number of client requests and tasks your team needs to tackle.

2. Improve accuracy

The more people inputting or changing data, the more chance there is for errors. This is reduced when employees and employers can do the data entry themselves through the self-service platform.

3. Client Satisfaction

Self-service portals increase transparency and build trust with clients. When they have access to the data and can see processes such as payroll, it fosters more of a feeling of partnership, which in turn builds loyalty and longevity.

4. Competitive advantage

But ESS does more than just make your life easier. It also opens new ways to offer value to your clients. You can help them set up and manage ESS systems, guide them on best practices, and offer advice based on the more accurate data that ESS provides.

ESS isn't just a tool for managing payroll and HR data; it's a way to strengthen your role as a trusted advisor to your clients, and this helps you stand out from the crowd.



Employer and Employee Self-Service - a win for all parties

Benefits to CPA/PSB	Benefits to employer	Benefits to employee
Reduces the number of requests from clients, which saves time	Saves time by reducing requests from employees for items such as copy pay stubs and W2 forms	Access to HR and pay information 24/7
Processes are streamlined and more efficient	Access payroll and HR data when you need it without having to go back to the CPA/PSB	No delay waiting for requests to HR & payroll teams to be actioned
Improved data accuracy	Ability to run real-time reports when needed	Access to historical documents
Provides an enhanced service to clients	Functionality such as Time and Attendance helps with Workforce Management	Access via a mobile device (if an app is available on the ESS platform)
Frees up time and resources to focus on added-value activities	Ability to push out documents and communications to staff	Simple to log time and attendance
Additional revenue stream as ESS is a chargeable extra	Employee self-service is a great benefit to pass on to employees, which improves engagement	Easy PTO requests
Supports client 'stickiness'	Empowers managers to control HR-related tasks	Access to company documents and training

The Strategic Advantage of ESS

Employee Self-Service systems significantly advance how organizations manage and interact with their workforce. For accountants, CPA firms and PSBs, the implications of adopting ESS extend beyond mere operational efficiencies. It encompasses a broader strategy of client engagement and service enhancement. As the business landscape evolves, adopting technologies such as ESS will increasingly become a benchmark of organizational adaptability and success.



Implementing ESS Solutions for Clients

Successfully implementing ESS for clients requires a strategic approach and an understanding of potential barriers and pitfalls. This should be a positive experience for all, not a source of stress that could sour the relationship.

Assessing Client Needs

The first step is to comprehensively assess your client's specific requirements. This should take into account;

- Size of organization
- Complexity of payroll and HR processes
- Structure of workforce
- Current level of technological adoption

Select the right ESS platform

As a CPA or PSB, choosing a software solution with ESS capabilities requires considering the type of client businesses in your portfolio.

The solution should be flexible, scalable, compliant, and have robust security features. Usability is also essential, as you don't want to use valuable resources to implement, handle, and field queries about the ESS platform.

Customization and Integration

Customization may be required to fit with your client's business's specific workflow and processes, such as aligning with specific payroll cycles, leave policies, and other HR functions.

Ideally, the ESS should integrate with existing HR and financial software to ensure a unified 'ecosystem.'

Overcoming Resistance to Change

With any new technology, there is often resistance to the change. As a CPA or PSB, you are the trusted expert your client has turned to. It is up to you to show them the benefits of ESS, not only in their dealings with you but also for their employees.

By selecting an ESS platform that has a simple, modern and easy-to-use interface, you are setting yourself up for an easier adoption by your clients and acceptance and utilization by employees. A good ESS system will have a user interface that has been designed with the client, and their employees, in mind.

Make sure you are fully familiar with the solution you have chosen and have the support of your vendor to enable you to provide a solution that will wow your clients.

Monitoring and Continuous Improvement

After the ESS system is in place, ongoing monitoring is crucial to evaluate its impact and ensure it meets your clients' objectives. Encouraging user feedback can provide valuable insights into areas for improvement or opportunities your clients may be missing when using the solution.

Implementing ESS solutions for clients represents a significant opportunity for CPA firms and PSBs to add value to their services. By adopting a strategic approach that encompasses assessment, selection, customization, and support, you can effectively guide your clients through the transition. Ultimately, the successful implementation of ESS can lead to increased operational efficiency, improved data accuracy, and enhanced employee satisfaction for clients, further solidifying your status as a trusted advisor.



Tackling the Challenges Head-On

Even the best things come with their own set of challenges, and Employee Self-Service (ESS) systems are no different. While ESS offers a ton of benefits, there are a few hurdles that CPA firms and PSBs might face along the way. But don't worry, none of these challenges are deal-breakers, and with the right approach, they can be overcome.

Getting Everyone Onboard

One of the first challenges is getting everyone on board with the new system. Change can be hard, and not everyone is a tech wizard. Some people might be hesitant to ditch the old ways and embrace a new system, especially if they're not super comfortable with technology.

Solution: The key here is training and communication. Make sure everyone understands how the ESS system works and the benefits it brings. Offer plenty of training sessions and resources to help everyone get comfortable. It's also a good idea to have a few ESS champions who can help and encourage their colleagues.

Data Security Concerns

Security is a significant concern for any system that handles personal and financial data. You and your clients want to ensure that sensitive information is safe and sound.

Solution: When choosing an ESS system, select one with a solid security track record. Look for features like encryption, two-factor authentication, and regular security audits. It's also crucial to educate everyone about safe online practices, like using strong passwords and being wary of phishing scams.

Keeping Up with Compliance

Laws and regulations around payroll and employee data can be a moving target, and staying compliant is a must. With ESS, you need to ensure the system keeps up with any changes in the legal landscape.

Solution: Choose an ESS provider known for staying on top of compliance issues. They should regularly update the system to reflect any new laws and regulations.

Integrating with Existing Systems

Many businesses already have a host of different systems in place, from accounting software to HR databases. Getting the ESS system to play nicely with these existing systems can be a headache.

Solution: Look for an ESS system known for its flexibility and integration capabilities. Many providers offer customizable solutions that can be tailored to fit your specific needs.

Keeping Up with the Future of ESS

Hopefully, we have demonstrated the benefits ESS brings to all parties and how you can leverage these benefits for your firm and clients. But technology never stays still, so what does the future look like for ESS, and how can you stay ahead of the curve?

ESS systems are getting smarter every day. Thanks to advancements in technology such as artificial intelligence (AI) and machine learning, ESS platforms are becoming more intuitive and user-friendly. Imagine ESS systems that can predict what Information an employee might be looking for or offer personalized insights based on their data. That type of functionality could be transformative.

Follow industry news to keep up with these future trends. Make sure your tech partner is forward-thinking and that there is a strong roadmap for the solution's future development.

Mobile is a Must

These days, everyone's doing pretty much everything on their cell phones, and ESS is no exception. The future of ESS is mobile, with apps and mobile-friendly platforms making it easy for employees to access their information on the go.

So, make sure your chosen ESS solution provides a great mobile solution for employees with a good user experience. This is no longer a nice-to-have; it's a must-have.

Data Security is More Important Than Ever

As ESS systems evolve, so do the risks associated with data security. Protecting personal and financial data will be even more crucial in the future, with stricter regulations and higher expectations from employees and clients.

Keep data security at the top of your priority list and work with ESS providers who take security seriously and constantly update their systems to combat the latest threats.

Integration is Key

The future of ESS lies in seamless integration. As businesses use more and more different types of software, having an ESS system that plays well with others is essential. Whether integrating with payroll software or HR systems, ESS platforms must be flexible and adaptable.

Look for ESS solutions known for their integration capabilities or that are existing modules on your payroll and HR software solution.



How ESS Gives You the Edge

We've covered a lot about Employee Self-Service (ESS) - from the basics to the benefits and the challenges, and even looked into the future. The importance of ESS should not be underestimated in terms of giving your CPA firm or PSB that extra edge over the competition. After all, it's not just about keeping up; it's about standing out.

Improved Efficiency

ESS is a giant leap towards efficiency, streamlining tasks, reducing errors, and reducing the number of time-consuming client requests. This all leads to better use of your valuable internal resources, freeing up your people to respond quicker to clients and add value to the service you provide with more complex activities.

Tip: Make sure you use this efficiency as a selling point. Let potential clients know that with your firm, they're not just getting an accountant or payroll services bureau; they're getting a partner who uses the latest tech to keep things running smoothly.

Boost Client Satisfaction

ESS directly impacts client satisfaction in a big way. Your clients will notice when their employees are happier, and tasks are easier to manage. Happy clients are not just loyal; they're also your best advocates. Word-of-mouth from a satisfied client is more powerful than any marketing strategy.

Tip: Highlight success stories and testimonials from clients who've experienced ESS's benefits firsthand. Nothing speaks louder than real-world results.

Offer Smarter Insights

With ESS, the data you work with is cleaner and more accurate, which means you can provide smarter, more targeted insights to your clients. This kind of value-added service sets you apart from the crowd. It shows that you're not just about balancing the books or processing payrolls; you're about helping their business grow.

Tip: Make sure your clients understand the direct link between the data from ESS and the insights you provide. Teach them how this data can inform their business strategies and decisions.



Save Money to Make Money

ESS helps cut costs by reducing errors, saving time, and even cutting down on paper use. These savings can be significant, and when you pass them on to your clients, you're not just their accountant or payroll services bureau but a key player in their financial strategy.

Tip: Be transparent with your clients about how ESS helps save money and how those savings can be reinvested into their business. Showing your clients how you directly contribute to their bottom line is a powerful way to build loyalty.

ESS is more than just a tool; it's a way to redefine how you do business and engage with your clients. By embracing ESS and all its benefits, you're not just keeping up with the times; you're setting your firm up as a forward-thinking, client-focused leader in your market.

So, leverage ESS to streamline processes, enhance client satisfaction, offer valuable insights, and contribute to financial efficiency. This is how you stand out in a crowded market and build a reputation as a firm that not only keeps pace with the future but drives it.



IRIS ESS Solutions

IRIS Software provides a wide range of software and services for CPA firms and Payroll Services Bureaus, allowing them to provide payroll and HR services to their clients and helping them create additional revenue streams for their businesses.



IRIS Employee Self-Service

ESS modules are integral to the IRIS Payroll and HR solutions available to CPAs and PSBs. These solutions allow accountants and bureaus to add employee self-service to their offerings.

- Providing additional revenue streams
- Building client loyalty
- Delivering an end-to-end service
- Improving client retention
- Streamlining processes to free up resource
- Improving data accuracy



Find out about the IRIS ESS solutions



The new ESS module drives efficiency and productivity through its standardized approach to data entry with heightened security. The benefits of ESS for our customers and their employees are easily marketable by reducing manual data entry, thus fostering continued growth for the firm through established relationships.

Our clients already see the benefits of ESS within their businesses. The module allows remote workers and their employers to upload and share sensitive documents such as identification or performance reviews through a secure platform instead of email. Furthermore, automating the onboarding process reduces the workload for employers.

Tyler Winn, Founder and President of Cirrus Payroll