

We have developed a set of questions to help you plan how to approach the design and implementation of your leave planning and absence management solution.

The questions and recommendations below will be useful for you whether you decide to use [LeaveWizard](#) or not.

We have also added a [LeaveWizard](#) specific section which tells you a little more about the type of system and company LeaveWizard is. We would be very happy if you decide to read it.



We think there are three groups of questions you have to answer before you start looking at implementation options for your staff holiday planning:

1. What are the most important specifics of my organisation's business practice that may affect the type of leave management system I am about to implement?
2. Based on the information identified in point one what type of system might satisfy my most important requirements?
3. If there is no system that satisfies all of my requirements what shall I do?

What are the most important specifics of my organisation's business practice?

Try to answer the following questions which will provide some basic understanding on what features you would be looking for:

1. Is your main holiday type in days or hours or both?
2. How many locations do you have and are they in different territories?
3. Do you use a simple Mon-Fri, 9 to 5 work pattern or do you have employees on shifts and non-standard work patterns?
4. Does leave allowance for your main holiday type include public holidays?
5. Who approves leave in your organisation?
6. Are there Secondary approvers?
7. Do you have a custom leave year start date –e.g. different from 1st January? Can it be different for each employee?
8. Do you want to share all leave with your employees via Outlook or Google Calendar?

9. Do you need to calculate Bradford factor?
10. Do you have lots of existing leave data which you wouldn't want to add manually?
11. Do you need to control leave visibility?
12. Do your employees work overtime?
13. Can overtime be converted into toil?
14. Do you need email notifications to be sent to your employees?
15. Do you want to restrict the number of employee that can be on leave at the same time?
16. Do you require extra features such as room booking?

While this is a good list to start with it probably does not cover everything you have to consider. You may have additional and important specific requirements so you should carefully think about generating more relevant questions to add to this list.

Once you have identified your questions you may also want to put them in order – from most important to least important. This will help with your decision making later because realistically it is possible that none of the available systems will cover enough of the features you need in which case you may need to look for system that satisfies most of your high priority features.

Based on the information identified in point one what type of system might satisfy my most important requirements?

Your concrete answers to questions in section one will help you understand better which of the types of options we consider below will be the best match for your implementation.

When it comes to types of leave systems the available choices usually are:

1. A paper based system
2. A spread sheet based system
3. Off the shelf desktop application
4. Bespoke application
5. Online based system

Let's look at each one of them to see the pros and cons in each case.

A paper based system

Unless you are only just starting your career you have probably used at least one of these throughout the years. The advantage is that you have every piece of information in physical form which some people prefer and every decision is very well documented. The disadvantages though are many – you have to separately calculate allowances and communicate leave information on request or regularly. The speed of requests and

approvals is slow and could be disappointing for your staff. On the surface this system seems to be at no cost however if you were to calculate the time you and your staff spend filling in and processing holiday cards, calculating allowances and communicating leave on request you will certainly find that the time people spend on such tasks could be used more effectively on other activities and you should consider this major disadvantage of paper based systems when you are making a decision.

A spread sheet based system

A step forward from the paper systems although many of the tasks are still manual. In fact we have seen people using both paper and spread sheet based systems at the same time. The electronic spreadsheet is used to record the allowances and calculate remaining leave. The advantages are that some of your calculations will be automated which saves time, you may waste less paper and the automation of some tasks reduces the chance for errors. However all communication will still be manual – whether via printed or electronic messages. Approvals and rejections, cover, etc. will need to be synchronised and watched by you manually. Overall there is a minimum saving of time but the work for you remains pretty much the same as with paper based systems and you still retain many of the downsides – delays in processing, manual approvals, no automated calendars, etc.

Off the shelf desktop application

This usually is a leap forward (depending on the quality of the application). It will do automatically most calculations that you need and may even publish calendars to Outlook or similar. It is like a fully automated spreadsheet which means more time for you. As you can guess though it is very likely that there will be quite a bit of manual work to get the information in and reports out of the system. Off the shelf applications also are often difficult to customise and not as flexible as online based applications. And finally since there are desktop based they usually are tied to a specific operating systems and licenses are per PC which means they cannot be accessed from everywhere on any operating system like Windows or Apple and most likely available only on limited number of devices.

Bespoke application

Many people find that their specific operational model requires features that none of the available systems provide. At this point they may consider hiring developers or external vendor to create a bespoke application for them. When they find the right type of vendor such applications can be of great use because they are likely to have the exact features that you need. There are two main downsides to this. First as you may have guessed bespoke applications are expensive because they are developed just for you.. And second – over time your requirements will change but you are unlikely to be able to retain the same developers so they can change the system as and when you need it.

Online based system

Online based systems have many advantages – they allow for frequent updates, they do not require hosting so you don't have to worry about IT or support and they are available from everywhere so you can do everything from your office, home or any place with connection to the Internet, they have the option to combine the automation of desktop based systems with automated communication, easy approvals, etc. Sounds perfect, right? As you may have guessed - there are traps. And the most dangerous ones we have identified are the two below:

1. These days designing a nice looking web site is affordable and common. Nice looking web sites can mislead you as to what the actual system does. So insist on a trial – you should try the product in real scenario and you should also contact their support to get a feel as to how quickly they respond and how well they communicate. It is very important to have a good relationship with the vendor because as we've mentioned previously – it is unlikely that you will be able to find the ideal system that will keep being ideal a year or two from now. Therefore a vendor keen to help solve your specific problems is better than a system that looks ideal at this point in time.
2. The second potential problem is how the product is priced and is it worth it for you. Some vendors go beyond what's required and design the "perfect" system, just not the perfect system for you. And because they have invested heavily they also price their services well above what the service should cost. You should look at estimating how much time can the system save you and is it worth for the price you pay.

If there's no system that satisfies my requirements what should I do?

It is possible that even if you've looked through our questions in section one and the options in section two and you've researched online and yet there does not seem to be a system that looks like a good fit. In this case we will re-iterate our advice mentioned earlier. Try talking to the vendors, perhaps request a demo. Try to understand how they work. Is this their only product or one of many (and therefore not always ready to invest in this one) Do they have a heavyweight process which makes them expensive? Are they happy to openly discuss the possibility of adding the features you care about? Do they look to tie you in a long term contract? Can they offer you an extended trial? Will they support you during your set-up phase? What is the set-up time (in today's world we would not settle for more than 30 minutes to be honest)? Does the product offer both import (to get you up and running quickly) and export (in case you want to move elsewhere)? And if you still can't decide why not get in touch with us? We're always happy to talk about leave systems and implementations. This is our main and only focus. We respond quickly, have a lightweight process and we genuinely aim at creating a product that our customers love to use.

We hope you find the information we have given you to be useful. We have tried to remain unbiased until this point and in the next section we will tell you a little bit more about LeaveWizard (you're welcome to skip it if you think it may not be useful).

About LeaveWizard

LeaveWizard was born because as line managers in two different companies the founders were frustrated by the staff holiday systems they were asked to use. Paper or excel based solutions or internally hosted ones that were slow and clumsy and employees hated them.

We designed LeaveWizard to provide easy to use web based interface to allow quickly requesting and approving leave and publishing calendars so they are available on every device. We also wanted to give administrators a leave system that allows customising its features to a great extent.

We continue to enhance and make our leave management application faster to set-up easier to use, more accessible and highly customisable. We have little overhead and our prices are affordable. We make changes daily and deploy new versions every few weeks. We are committed to enhancing the application and we'd like you to let us prove how useful it can be to your business.