

The Payroll Problem Diagnostic

Provider, System, or Process?

Before you switch payroll providers, find out where your payroll problems actually start. Work through this with the people who run payroll. Type right into the fields and check the boxes, then save your copy.

YOUR NAME

COMPANY

DATE

1. Your top three payroll frustrations

Write them down point blank. Then ask: do we control the data behind this one?

1.

☐ We control this data

2.

☐ We control this data

3.

☐ We control this data

2. Process check

Check every statement that is true today. Unchecked boxes are where your payroll errors are most likely starting.

☐ Every payroll input, like new hires, rate changes, and benefit deductions, has a named owner.

☐ Other teams tell payroll before they change a step, like onboarding or contract setup.

☐ Fields payroll depends on are required in onboarding and our HR system.

☐ We have in writing what our provider handles versus what our team handles.

☐ Payroll steps, pay rules, and exceptions are written in SOPs, not just in someone's head.

☐ We keep notes on exceptions, like who is out this week or who has an unusual pay period.

☐ Automated steps are still reviewed and audited every payroll cycle.

☐ Employee pay questions get a response within a set time, with a clear explanation.

Total checked: of 8

Reading your process check

0 to 3: Your payroll pain is most likely a process problem. A new provider would inherit it.

4 to 6: The basics work, but gaps appear when volume or people change. Fix those before you shop.

7 to 8: Your process is solid. If payroll still hurts, you have real evidence to take to your provider.

3. Issues log

Log every payroll issue for the next two months. The pattern tells you whether it is your provider or your process.

DATE	WHAT HAPPENED	OWNER	ROOT CAUSE	US OR PROVIDER?

4. Provider red flags

Check any that keep showing up in your log.

- ☐ They change configuration on their end without telling us.
- ☐ Our data only fits after manual rework every cycle.
- ☐ Getting help means a queue or long email threads.
- ☐ Sales said yes, then engineering could not deliver.
- ☐ We have outgrown it: more states, remote staff, new integrations.

5. Before you switch

Check each one off before you sign.

- ☐ We met with our current provider about our expectations first.
- ☐ Their engineering team tested our real data, not just sales.
- ☐ They meet us in the middle instead of making us change everything.
- ☐ We know who picks up the phone when payroll is due.

6. What would make you love your next payroll provider?

In a perfect world, what would your team spend more time on, and less time on?



Want a second set of eyes?
Book a business chat with Unified Linc.
<https://zbooking.us/gEWMX>



Watch the full episode
With Nakiea Bridges, CPP, on Virtual Equity.
<https://youtu.be/RuW-rYNXjzY>