



Use the below guide to lead smarter, more focused conversations during payroll software demos. These questions will help you evaluate functionality, support, and fit—so you walk away with a clear picture of which platform works best for your team.

Questions	Why Ask
Multi-State Compliance	
Can I run payroll in multiple states?	Ensures the platform can handle remote and distributed teams with complex compliance needs.
Implementation	
What is your implementation methodology?	Clarifies expectations and ensures a structured onboarding process for a smooth go live.
Payroll Processing	
Can you show how to preview payroll before submitting?	Helps to avoid surprises and errors before final payroll is processed.
How does your system handle off-cycle payments or bonuses?	Checks flexibility for unscheduled or special payroll runs.
Can we customize pay groups or pay schedules?	Supports varied pay structures and company-specific scheduling needs.
Tax Compliance	
Are filings and year-end forms (W-2s/1099s) included?	Confirms core compliance functionality is handled and included.
Do you support outsourced tax filing if we want a hybrid model?	Allows for flexibility if you want to keep payroll in-house but outsource tax complexity.
Employee Experience	
What can employees do in the self-service portal?	Measures how much admin work is shifted from HR to employees.
Is the self-service experience mobile-friendly?	Evaluates accessibility and user adoption by a mobile-first workforce.
Can employees access historical pay and tax data on demand?	Ensures employees have easy access to past pay and tax info for things like loans or taxes.

(More questions on the next page.)

What to Ask

Questions	Why Ask
Integrations	
How does your platform integrate with time tracking and benefits?	Validates the platform can seamlessly connect data across HR, benefits, and payroll.
Do you integrate with our accounting software or General Ledger?	Supports accurate accounting and audit trails.
Are integrations native or do they require third-party connectors?	Identifies potential extra work or costs related to system connections.
Reporting	
Can we create custom payroll reports?	Enables custom insights and tailored reporting for finance and HR teams.
What standard payroll reports do you include out-of-the-box?	Confirms whether you'll get the key reports needed for audits, planning, and compliance without additional custom work.
Do you offer real-time dashboards for payroll data?	Supports data-driven decisions with real-time visibility.
Security	
What certifications do you hold (SOC 2, etc.)?	Indicates data security standards are in place to protect sensitive information.
How customizable are roles and access permissions?	Ensures appropriate data access based on team roles and responsibilities.
Support	
What kind of customer support is included in the post-launch?	Ensures ongoing help and stability after implementation ends.
Describe your support model.	Provides insight into how quickly issues will be resolved and what level of help you'll receive.
Pricing & Packages	
What's included in your base payroll package vs. add-ons?	Clarifies what functionality is included and avoids surprise costs.
Are there setup, integration, or tax filing fees?	Helps you understand the true cost of ownership.
Scalability	
Can we scale usage or services as our company grows?	Ensures the platform can grow with your business without requiring a costly switch.

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