

Research Question Guide

Research objectives:

- Understand the headcount budgeting process
 - Process
 - Core problems
 - Roles and responsibilities
 - Outputs
 - Decisions supported
 - Benefit and risk/value of doing it
 - Tools used
- Understand current experiences and use cases for the headcount budgeting process
 - What is the process like?
 - High and low points
 - Opportunities for solutions

1:1 Interview Questions

Introductions

Hi! Thanks for taking the time to join us today! My name is [name] and my pronouns are [she/her] and I'm a [role] and I'll be facilitating our conversation today. I also have other team members on the call listening and taking notes and at certain points, I may take a minute to gather questions from them.

Commented [VH1]: Added this to remind myself to give quick intros. Can delete though if we wanna just keep this a question guide and not a detailed script!

High level goals:

Today we'll be talking about the Headcount Budgeting process at your company. We want to understand how the process works at different companies, and explore ways that Dayforce could help make the process better.

We're scheduled to chat for 1 hour today, and we want to use this session today to understand your experiences doing headcount budgeting.

Before we start, I want to stress that there no right or wrong answers today. We are only looking for your honest experiences and feedback. You are the expert of your experiences and we are trying to learn from you. You are free to decline to answer any question and you can withdraw your participation in this study at any time and for any reason without any penalty.

Consent script

In addition, I want to get your consent to conduct this session. I'm going to read from a script and ask for your consent to begin and record our session. Then, after we start the recording, I'll repeat that script and ask for your consent a second time.

Commented [RD2]: @Valerie Hu can you add in the content here that we need to speak outloud please?

Commented [VH3R2]: added!

It feels kind of awkward to do this twice, but we want to make sure we have a record of your consent.

[BEFORE RECORDING]

We'd like to document our session today both by taking notes and audio and video recording. This is for internal research purposes only and will help us improve the experience of using Dayforce products and services. The recordings allow us to go back and make sure we understood what you meant because we can't always take notes as fast as you speak. Is it okay to start the recording?

[IF NO TO RECORDING, be sure to confirm specific limitations (whether audio, video, screen sharing, taking notes) and decide whether it is worthwhile to conduct the session. Will notes be sufficient for your needs?]

[IF NO ALSO TO TAKING NOTES, decide whether it is worthwhile to conduct the session.]

[IF YES, PRESS RECORD and repeat the consent script below on the recording]

Now that we're recording I'm going to read from the script again and ask for your consent again: Do you consent to take part in this study and for our conversation to be audio and video recorded for internal Dayforce research purposes only?

[Allow participant to consent or decline.]

Great, I also want to let you know that you can stop this interview at any time. Let's get started.

Demographic Questions

1. What's your role or job title?
2. How long have you been in this role?
3. How long have you been using Dayforce? *[this question is not *needed* but we can ask quickly]*
4. How comfortable are you working within Dayforce?

Commented [MP4]: Would we want a question here to gauge the person's familiarity and experience with custom forms?

Commented [VH5R4]: yes! added the "How comfortable are you working within Dayforce?"

Intro Questions

1. In your own words, what is headcount budgeting?
2. What business problems does it solve?
3. What is the most valuable part of doing headcount budgeting?
4. What is the most challenging or frustrating part of doing headcount budgeting?

Recent experience

We'd love to talk about and walk through a recent experience you had doing headcount budgeting for your company. I'd like to ask you to think of the most recent experience you've had doing headcount budgeting at your company. I'll ask some questions about that experience.

1. First, tell me about the need you had. How did you know to start the headcount budgeting process?
 - a. Did you work with anyone else to start the process?
2. How long did the process take?
 - a. How often does your company do headcount budgeting?
 - b. When does the process usually start and end?
3. What were some of the major activities or steps you followed?
4. What were the outputs or deliverables created from the process?
 - a. Who used them?
 - b. What were they used for?
5. Tell me about some of the data or information you needed. What decisions were you trying to drive with this data?
 - a. What tools did you use to do the work?
6. Was anyone else involved in the process?
 - a. Who did you work with?
 - b. Did you work with different people in different phases?
 - c. If not, would you have liked to involve others?
7. Thinking about this recent experience.
 - a. What went well? What were the high points?
 - b. Which steps in the process were most challenging?
 - c. What would make the process easier?
 - d. Is there anything that would make the process of headcount budgeting more useful or impactful for your company?

Commented [MP6]: @Valerie Hu and @Rachel Disselkamp I reframed this beginning part to be more about a recent experience and getting the to walk you through something specific. This helps avoid gathering general feedback without context and might give you the opportunity to learn about specific use cases and the problems they're trying to solve more indirectly. (In other words, some participants might have a hard time answering a question like what problem are you trying to solve with forms which might feel abstract.)

8. What software or other tools do you use for headcount budgeting? Do you have a favorite, and if so, why?

Additional Questions (if there's time)

1. Have you ever requested or received help on headcount budgeting from Dayforce?
 - a. Tell us about it. Who did you reach out to for help?
2. What does your company use Dayforce for?
3. Do you use any other software for your HR/Employee needs? If so, which ones?
4. Where are the places in this process that you could see a software solution really benefiting your company?
5. How do you define the cost of a headcount? (e.g salary, benefits, bonuses, merit increases, etc.)
6. How are headcount requests managed outside of regular cadence? (e.g how are ad hoc requests handled after budget is defined)
7. How are headcount budgets broken down across the organization? (e.g top down vs bottom up)
8. After a budget is defined, how do you measure if you are operating within or over budget?