HR TECHNOLOGY ADVICE

HR Technology Buyer's Checklist

Congratulations on embarking on the journey to select the right HR technology solution! Whether you're new to this or a seasoned pro, our checklist provides a systematic approach for project success. With 42% of HR tech projects falling short, our HR Technology Buyer's Checklist helps prepare you to be part of the successful 58%.

To uncover more tips and strategies for your HR vendor evaluation and selection process, review the companion HR Technology Buyer's Guide. Use this checklist and mark each item as you progress through your HR tech vendor selection process.

Project Planning

Before you engage with HR tech vendors, start with thorough upfront planning. As the saying goes, "Failing to plan is planning to fail." The extent of your project planning depends on your organization's size and complexity. Your organization may be able to streamline this process depending on your needs.

1. [ ] Conduct a Needs Assessment
2. [ ] Define Your Objectives
3. [ ] Create a Project Team
4. [ ] Establish a Budget
5. [ ] Document Workflows
6. [ ] Identify Must-Have Features
7. [ ] Prioritize Requirements
8. [ ] Data Migration and Integration Needs
9. [ ] Compliance and Security Requirements
10. [ ] User Training and Support
11. [ ] Change Management

Vendor Shortlist Research

Conduct vendor research to narrow your shortlist to 4-6 vendors for full engagement in the buying process. You shouldn't need to work with more than 6 vendors to find the perfect vendor solution. This number ensures your requirements will be met. Researching fewer vendors expedite the process and maintains your ability to differentiate the vendor offerings. In this case, less is definitely more.

12. [ ] HR Technology Advice
13. [ ] G2
14. [ ] TrustRadius
15. [ ] LinkedIn Network/Community

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Vendor Presentations

Vendor features continuously evolve and improve over time. If a vendor lacks a needed feature today, they may introduce it in 6-12 months. What matters most is not the vendor's specific features today, but the vendor's track record of customer responsiveness and ongoing innovation. As your organizational needs will continuously evolve, select a vendor capable of adapting to or anticipating those changes.

16. [ ] Vendor Discovery Calls
17. [ ] Product Demos
    a. [ ] Identify Each Vendor's Key Differentiators
    b. [ ] Vendor Implementation Process
    c. [ ] Product Ease of Use
    d. [ ] Reporting Flexibility
    e. [ ] Support Methodology
    f. [ ] Integration Support
    g. [ ] Vendor Culture Fit

Vendor Selection and Purchase

You have chosen the solution that best fits the needs of your organization. Now you want to lock down the details that will ensure the relationship begins based on a clear understanding of cost, customer references, and contractual requirements.

18. [ ] Negotiating Costs
    a. [ ] Ongoing Costs
    b. [ ] Implementation Costs
    c. [ ] Training Costs
    d. [ ] Miscellaneous Costs
    e. [ ] Renewal Costs
19. [ ] Check References
20. [ ] Confirm Data Ownership
21. [ ] Final Contract

Conclusion

This HR Technology Buyer's Checklist has equipped you with a systematic process for assessing HR vendors to determine which is the best fit for your organization, not just for today but for years to come.

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