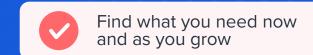
## **Evaluation Checklist**



A quick-hit tool to help you define your must-haves, assess needs, and stay focused during your search for HCM technology.

1. SET YOUR FOUNDATION				
☐ Have we clearly defined the business challenges we need to solve?				
☐ Have we documented the current pain points across HR, Payroll, Benefits, and Compliance?				
☐ Have we identified key internal stakeholders (HR, IT, Finance, Operations)?				
☐ Have we established a timeline for evaluation and implementation?				
2. DEFINE MUST-HAVE FEATURES				
Prioritize these features before demoing any platforms. Mark each as: Must-Have   Nice-to-Have   Not Needed				
Feature	Must-Have	Nice-to-Have	Not Needed	
Payroll & Tax Filing				
Benefits Administration & Open Enrollment				
Employee Self-Service Portal				
Time & Attendance Tracking				
Recruiting & Applicant Tracking				
Onboarding & Offboarding				
Performance Management				
Employee Engagement Tools				
Learning & Development				
Reporting & Analytics (customizable & real-time)				
Compliance Monitoring & Alerts				
Mobile Access & Multi-Device Support				
Role-Based Permissions & Approval Workflows				
Tech Integrations & Open API				
Configurable Workflows				
Alerts & Notifications				
Centralized Communications				
Document Storage				
Expense Management				
3. EVALUATE SCALABILITY & FLEXIBILITY				
☐ Can the platform support our projected headcount and growth?				
☐ Can it accommodate multi-state or global compliance needs?				
☐ Can workflows and dashboards be configured to our unique needs?				
☐ Is the vendor regularly updating their platform with new features?				

## **Evaluation Checklist**

4. ASSESS THE USER EXPERIENCE
☐ Is the platform intuitive for both HR admins and employees?
☐ How easy is it to navigate and complete common tasks (e.g., submitting time off, running payroll)?
☐ Is the employee interface mobile-friendly and consumer-grade?
5. UNDERSTAND IMPLEMENTATION & SUPPORT
☐ What is the typical implementation timeline for a company of our size?
☐ Is a dedicated implementation manager provided?
☐ Are training resources available for admins and employees?
☐ What kind of ongoing support is included (chat, phone, email, dedicated CSM)?
☐ Are there additional fees for implementation, training, or support?
☐ Will we be assigned a dedicated implementation pod with specialists in payroll, HR, benefits, and time?
☐ Does the vendor offer data migration assistance, including pre-configured templates and auditing?
6. REVIEW SECURITY & COMPLIANCE
☐ Does the vendor have up-to-date data privacy certifications (SOC 2, ISO, etc.)?
☐ Does the system offer role-based access and multi-factor authentication?
☐ Are audit trails and historical data easily accessible?
☐ Can the system alert us to regulatory changes or potential compliance gaps?
7. BUILD A SHORTLIST AND COMPARE VENDORS
☐ Have we created a shortlist of 3–5 vendors?
☐ Have we attended demos and documented feedback from all stakeholders?
☐ Have we filled out a Vendor Scorecard to weigh pros/cons?
8. SECURE BUY-IN AND MAKE A DECISION
☐ Have we prepared a business case showing ROI, TCO, and impact on productivity?
☐ Have we presented to executive stakeholders for sign-off?
☐ Are we aligned on a go-live plan, change management strategy, and post-implementation support?

## **Let's Tackle Your Challenges Together**

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