

Evaluation Checklist



Find what you need now
and as you grow

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?

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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?

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