

HRMS SOFTWARE SELECTION CHECKLIST

The 52 steps you need to take to ensure HRMS software selection success

GUIDE HIGHLIGHTS



Building your HRMS selection team



Gathering HRMS software requirements



Forecasting ROI, creating software shortlists & more



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To help you schedule your HRMS selection, this 50 step checklist is divided into seven sections. You can also view and download the checklist as a spreadsheet.

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[Download as spreadsheet](#)



SELECTION TEAM

When it comes to HRMS software selection, the wrong team will almost always select the wrong system.



SELECTION TEAM TASKS

1



Select an HRMS selection project lead

2



Identify key stakeholders including operational HR staff, HR management and employees outside of HR

3



Randomly select a cross section of stakeholders to form user groups

4



Identify requirements for consulting expertise

5



Define scope and timeline for external consultancy resources

6



Develop selection consultant shortlist and gather references from previous projects for each

7



Identify a C-Level executive sponsor for your project



REQUIREMENTS GATHERING

Your HRMS requirements supply cartographic guidance for your selection; mapping existing challenges and future goals.



REQUIREMENTS GATHERING TASKS

1



Create a map of current HR processes to identify bottlenecks in efficiency

2



Identify paper-based HR process and shortcomings of existing HR systems

3



Identify key operational challenges you aim to solve with the new HRMS system

4



Estimate HR staff time currently dedicated to these operational challenges

5



Gather requirements from across the HR department

6



Document role-based access for each requirement

7



Prioritise requirements and provide a brief overview of the motivation behind priority scores

8



Take final requirements to end user groups to gather feedback



SYSTEM SPECIFICATION

Forget the bells and whistles, the success of HRMS software also comes down to core access and platform choices.



SYSTEM SPECIFICATION TASKS

1



Identify the total number of users who will require system access

2



Determine preferred delivery platform (cloud, on-premise, hybrid etc.)

3



Identify mobile access requirements (web-app, native iOS, native Android etc.)

4



Define ideal database structure (informed by regulatory requirements)

5



Determine any language and currency requirements

6



Identify requirements for integration with existing systems

7



Document existing hardware environment

8



Document existing network environment



VENDOR SERVICES

Often forgotten at the requirements stage, vendor services can require a selection project in their own right.



VENDOR SERVICES TASKS

1



Document requirements for support scope and delivery method (phone support, online support etc.)

2



Document requirements for training scope and delivery method (classroom training, on-site training)

3



Document requirements for implementation consultancy

4



Document requirements for external project management

5



Identify critical data and reports in your legacy systems (begin with compliance requirements)

6



Document data migration requirements for these critical data sets

7



Identify external requirements for system and network maintenance



ROI FORECAST

No sign of subjectivity here. Either the investment in an HRMS system makes sense, or it doesn't. The challenge is creating an accurate forecast for ROI.



ROI FORECAST TASKS

1



Identify preferred payment method (SaaS, perpetual license etc.)

2



Define timeframe for TCO and return calculations

3



Forecast the value of each system requirement including time savings

4



Forecast costs for the new system

5



Work with analysts and finance to produce final ROI forecast figures

6



Compare ROI forecasts for the new HRMS with those of other prospective points of investment (HR-focused or otherwise)

7



Report on ROI forecasts to senior management and seek project approval



VENDOR SHORTLISTING

Now begins the true “selection” phase. Are you ready to narrow down hundreds of solutions to a shortlist of HRMS systems?



VENDOR SHORTLISTING TASKS

1



Research HRMS employed by similar companies (scale, regulatory environment etc.)

2



Identify HRMS solutions that meet your key requirements

3



Identify point solutions that meet your key requirements

4



Compile initial shortlist of vendors

5



Produce an RFI document and send to shortlisted vendors

6



Narrow shortlist based on RFI responses

7



Compile requirements and business processes in an RFP document

8



Narrow shortlist based on RFP responses to produce final shortlist



SYSTEM SELECTION

You can see the finish line. There is light at the end of the tunnel (or at the very least, a difficult decision).



VENDOR SELECTION TASKS

1



Define the scope for your ideal software demonstration

2



Build selection teams to attend software demos including user group members

3



Book demonstrations with each vendor on your final shortlist

4



Seek at least two to three references from each prospective vendor

5



Produce an RFQ document and send to all vendors that were demoed

6



Assemble selection committee to review all RFQ responses

7



Make final selection decision and proceed to contract negotiations



FURTHER READING

To further explore each of the areas covered in this checklist, have a read of the following articles, exclusively available on HRMS World.

SELECTION TEAM & REQUIREMENTS GATHERING

- 3 nightmare HRMS project team members and how to deal with them
- 3 reasons you should outsource HRMS selection to consultants
- HRMS selection requirements: gathering key stakeholders
- 4 steps to gathering HRMS software requirements

VENDOR SERVICES

- Outsourcing HRMS support: advantages and disadvantages
- 5 HRMS support questions to ask your vendor
- Has poor training made your HRMS suck?

ROI FORECASTING

- What to consider when forecasting your HRMS ROI
- The hidden costs of an HRMS investment
- Analyzing your HRMS ROI figures

SHORTLISTS & FINAL SELECTION

- How to whittle down your HRMS vendor shortlist
- HRMS software RFP guide
- HRMS selection advice I wish I heard before my first project

This guide was written by Dave Foxall, HRMS World Columnist, with contributions from Richard Jefferson, HRMS World Content Editor

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