# 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



## INDEX

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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<u>Download as spreadsheet</u>





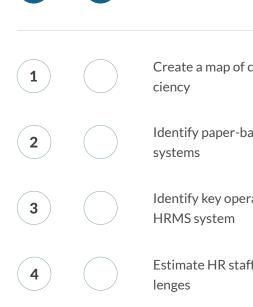


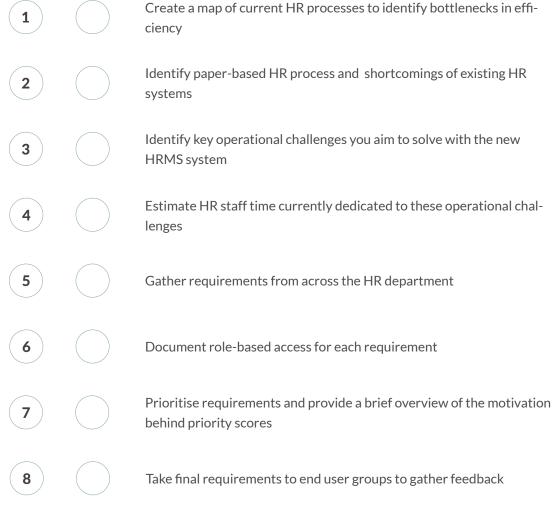


## **SELECTION TEAM TASKS**

<b>1</b>	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 TASKS** 







## **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**

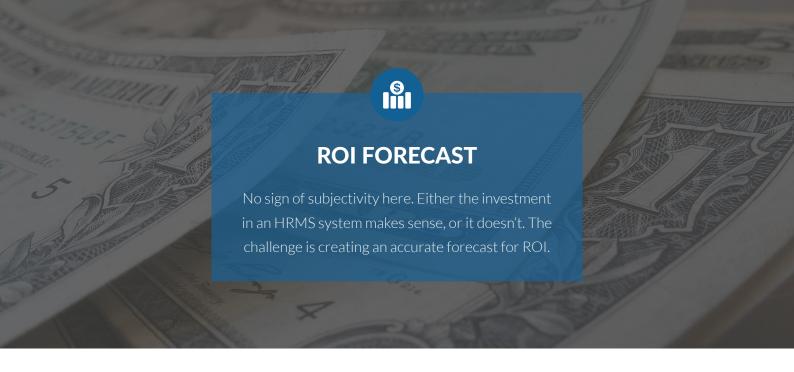
Often forgotten at the requirements stage, vendor services can require a selection project in their own right.





## **VENDOR SERVICES TASKS**

1	(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 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



# **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





