

What are the important features and functionality for your organization?

Leverage this checklist to help evaluate the right software for your employee relations needs.

CONDUCTING INVESTIGATIONS

- ☐ Embedded best practice tips, workflows and tools for employee relations and investigations
- ☐ Guided interview templates because what you ask is the key to what you are told
- ☐ Features designed to help your organization protect privilege, when needed
- ☐ Ability to designate involved parties as complainants, subjects and witnesses
- ☐ Auto generated investigation close out reports that adhere to EEOC recommendations
- ☐ Role based permissions ensuring confidentiality and eliminating the perception of retaliation
- ☐ Governed approval and review process

GUIDED ER WORKFLOWS

- ☐ Centralized Repository for all documentation and evidence
- ☐ Easy and seamless collaboration with team members
- ☐ Configurable letter and communication templates
- ☐ Electronic records of documentation receipt
- ☐ Scheduled tasks to keep cases current and on track
- ☐ Ability to upload documents, regardless of file type
- ☐ Document library for easy access to most frequently used policies

ACCESSING ANALYTICS & INSIGHTS

- ☐ Ability to compare case information with benchmark data from organizations of similar size and industry

- ☐ Readily accessible employee relations and investigation predefined reports and dashboards
- ☐ Track issues and trends by type, action, owner, severity, status, etc.
- ☐ User friendly report creation
- ☐ Multi-field search, save and schedule capabilities
- ☐ Permission Based Reporting and Dashboards

PERMISSIONS, SECURITY & CONFIDENTIALITY

- ☐ Role based permissions based on employee relations best practices
- ☐ Compliance with GDPR
- ☐ Single Sign On
- ☐ Multi-factor authentication

INTEGRATING WITH OTHER SOLUTIONS

- ☐ Seamless integration with HRIS
- ☐ Legacy system data integration to maintain historical information
- ☐ Integration with ticket management solutions and hotlines
- ☐ Integration with business intelligence solutions such as Tableau or Visier

TRAINING / SUPPORT

- ☐ Training that focuses on navigation and adoption
- ☐ Live support team to answer questions available 24/7
- ☐ 24/7 Support Center with employee relations articles and videos

After you create your must haves, break them down:

Do you understand which technology platforms meet these needs? Do you understand the difference between the solutions available? Have you explained the value and need to your key stakeholders?

We would love to help you evaluate the right employee relations software for your organization!

Contact us at info@hracuity.com to learn more.