



## Talent Management Checklist

### Questions You Can't Afford Not to Ask

The right HR software can propel your business to the next level. Here are a few things to expect, questions to ask and tips that can help your HR team determine the best HR software for your business needs.

#### ✓ Internal Stakeholders

First thing's first. Who should be involved in an HR software purchase

- ☐ **HR** – Whoever handles your HR processes now - whether that is an individual or a team - should be involved from day one.
- ☐ **Finance** – If your HR department's budget is managed by the finance team, they will need to see the business value in HR software before signing on the dotted line.
- ☐ **IT** – Your IT team will know exactly how to implement a new system and integrate HR software with your other systems.

#### ✓ Timeline

What's your timeline for the project? As the saying goes, anything worth having is worth waiting for. Here's a realistic timeline for implementing HR software and what to expect at each stage of the process.

- ☐ **Consideration Stage (As needed)**  
You'll need to spend some time researching systems, scheduling demos and discussing options with internal stakeholders.
- ☐ **Implementation Stage (4-8 weeks)**  
Expect to spend a few weeks talking with your implementation specialist to pinpoint exactly which functionalities your team needs. You will also need to dedicate some time each week or day to familiarize yourself with your new software system and conduct any internal trainings as needed.
- ☐ **Purchase Stage (1-3 days)**  
A good sales rep will have your contract turned around as soon as you are ready to sign. If it's a weekend or holiday, you may experience a delay until the next business day.



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### Cost

Whether or not your finance department signs off on HR software usually comes down to the bottom line. Make a business case for your finance team before sending them the proposal so they know the value your chosen HR software vendor brings.

- ☐ **Return on Investment** – Can HR software decrease other costs? For instance, if your HR software includes training plans that you’ve been paying a live trainer to conduct, it might be less expensive to opt into the software training instead. Ask your sales rep for an ROI calculator to determine exactly how much you could save.
- ☐ **Hidden Costs** – Ensure you know whether or not your costs will be affected if you add additional users or need to make changes to your system.
- ☐ **Billing Cycle** – Does your vendor require payment up-front or is there an option for a monthly payment plan? Make sure your chosen vendor can accommodate your billing cycle.
- ☐ **Cancellation** – Sometimes HR software won’t always hit the mark. Is there a cancellation fee associated with your chosen vendor?



### Employer Brand

How will HR software impact your employer brand?

- ☐ **Candidates** – In this candidate-driven market, there are many employment options available. Ensure your HR software will positively impact your employer brand to attract the most qualified candidates for your business. Your HR software should support an easy apply process and outline the benefits of working at your company.



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### ✓ Core Verticals

What types of customers do the vendors you're considering have?

- ☐ **Industry** – There are HR software systems that advertise a “one size fits all” business model. For some companies, this type of system might be a fine option. Highly specialized industries with specific requirements, however, might need a highly specialized HR software system to meet their needs. Check out vendors’ customer pages to see if they work with other businesses in your industry.
- ☐ **Size** – Does your chosen vendor seem to have only enterprise-sized customers? If you're a small or medium sized business, they may not be the correct vendor for you. On the flip side, if you're a large company and the system you're evaluating only has smaller businesses for customers, it might be time to look elsewhere.

Ask to talk with a daily user from a customer whose company is similar to yours. Reputable companies should have no problem sending you contact information from current customers. If your sales rep is hesitant, they may be trying to keep dissatisfied customers from giving you their real experience

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