THE HR SOFTWARE SELECTION CHECKLIST

The questions to ask today to ensure you get HR software that's fit for the challenges of tomorrow

cezanne™

TABLE OF
CONTENTS

INTRODUCTION

For modern businesses, HR departments play a critical role in driving organisational success.

As businesses evolve, so do the demands placed on HR professionals, necessitating the adoption of efficient tools and technologies to streamline processes, enhance productivity, and optimise every aspect of people operations.

This is where selecting the right HR software becomes a pivotal decision. However, with a myriad of options available in the market, ranging from basic systems to comprehensive suites, navigating the selection process can be daunting.

So, to assist HR professionals, decision-makers, and business owners in making informed choices, we present "The HR Software Selection Checklist." This comprehensive guide is designed to provide a structured approach to evaluating HR software solutions, ensuring that you find the perfect fit for your organisation's unique needs and requirements.

Whether you're considering implementing a new HR software solution or upgrading your existing system, this guide will walk you through the essential factors to consider, key features to prioritise, and critical questions to ask vendors. From assessing scalability and integration capabilities to evaluating user experience and support services, each aspect is meticulously examined to empower you with the knowledge needed to make a confident decision.

Our insights have been gleaned from over a decade's-worth of real-world experiences, "The HR Software Selection Checklist" equips you with the tools and knowledge necessary to navigate the complex landscape of HR technology effectively.
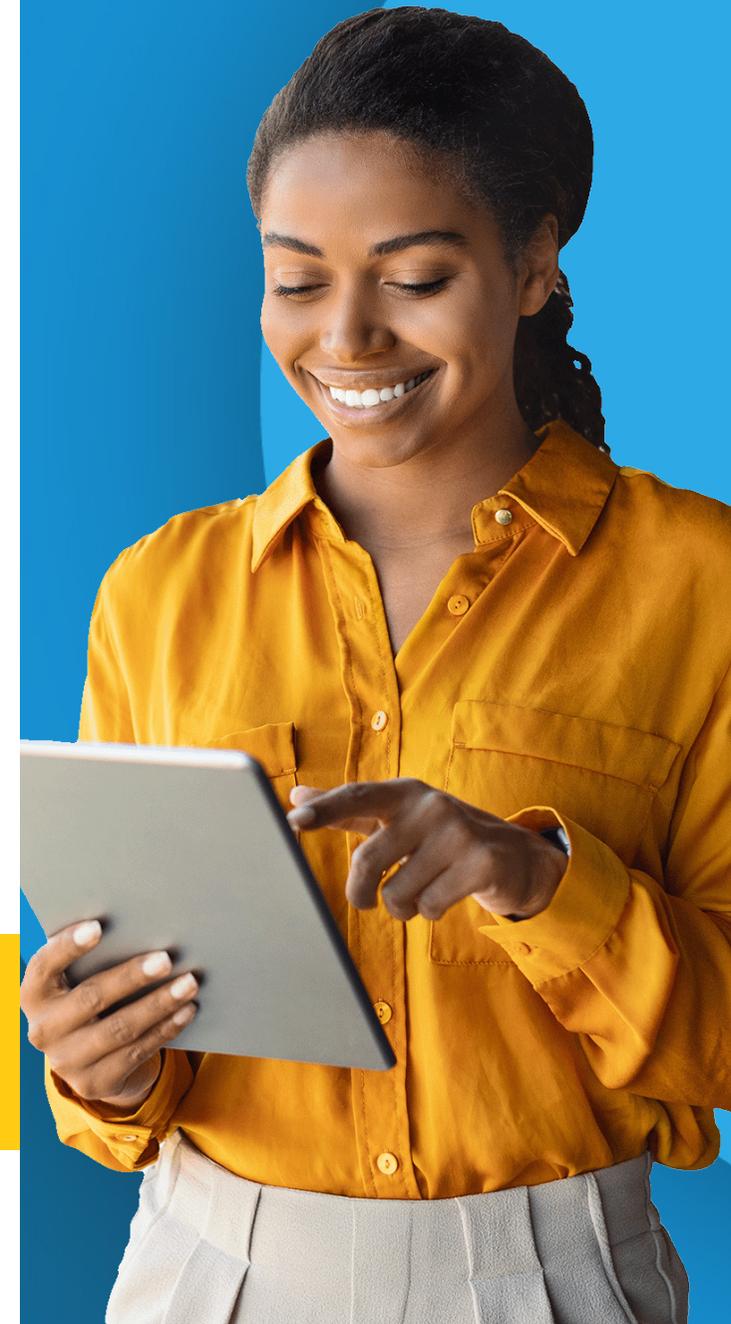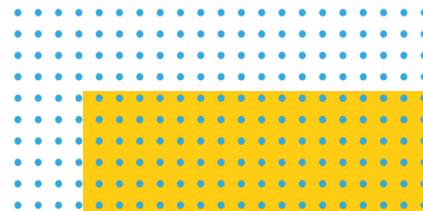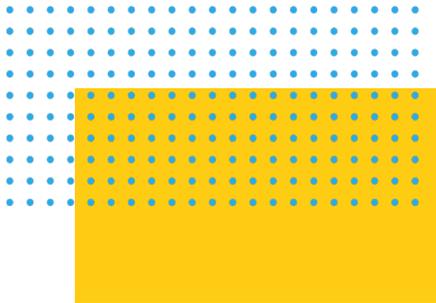
GETTING A HANDLE ON COSTS

For most of us, the first step in any HR software selection process is to identify the optimal match between system functionality and budget.

While there's no point in selecting an HR system that doesn't meet your essential requirements, putting forward a budget that the business won't sign off is going to be a frustrating waste of your time. HR suppliers have quite different pricing models, so it's important to ask the right questions to avoid any nasty surprises further down the line.

LICENCE/SUBSCRIPTION FEES

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ What are the license/subscription fees?				
✔ What are they based on? E.g. fixed headcount, active headcount, modules taken, users etc.				
✔ If my license/subscription is based on a fixed figure, what happens if I add more employees?				
✔ How are fees charged? E.g. Monthly, annually, in advance, in arrears.				
✔ Can I reduce the fees during the subscription term? E.g. if we have fewer employees or want to drop a module.				
✔ If so, how much notice is required?				
✔ What is the minimum subscription term?				
✔ Is there a cap on data storage?				
✔ If so, how much does extra storage cost?				

SET UP/IMPLEMENTATION

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ What set up services are included in the licence/subscription fee?				
✔ What would be the cost of a typical implementation for a company of OUR size?				
✔ What does that include and how long would you expect it to take?				
✔ Do you help with data upload? How is it managed? How much data will you upload?				
✔ If you configure / customise our solution, will those changes be carried forward into future releases, or might they need to be redeveloped and recharged for?				

TRAINING

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ What training would you recommend?				
✔ Who should be trained (HR, manager, employees, suppliers)?				
✔ What does training cost?				
✔ Can training be delivered online/at our office/at your facilities?				
✔ What training is provided when new features are released?				

SUPPORT

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
Is support an extra cost? If so, how much does it cost?				
How does support work?				
Do you have an online support portal?				
What is your SLA (Service Level Agreement)?				
What escalation processes are in place?				
Where are support staff based and what hours do they operate?				

MAINTENANCE & UPDATES

|	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
How often do you update the system with new features?				
Are updates automatic? Do we have to do anything to get new features?				
How are releases managed? When do you make updates?				
Is there a cost?				
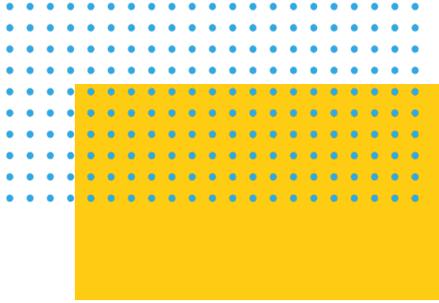
CONSIDERING CONTRACTUAL TERMS

Preparation is everything when looking to implement new software in an organisation, and that includes being prepared for a time when you need to move on.

Whether you're ready for a long-term commitment or not, it's important to know the suppliers' contract and cancellation policies. This is so you're aware of the implications of cancelling should your needs or priorities change.

What follows are the key questions you should ask when it comes to evaluating the terms and conditions of your shortlisted suppliers.

CONTRACT DETAILS

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ What is the minimum contract period?				
✔ How much notice must I give of cancellation?				
✔ How do I get data back should I cancel?				
✔ Is there a charge?				
✔ How long do you retain data after cancellation? *You'll need to know this for GDPR compliance.*				
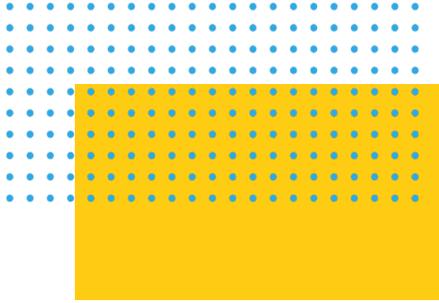
SECURING DATA
(& GDPR COMPLIANCE)

As an HR professional, you know how important data security is.

As the custodian of personal data, i t's yourr responsibility to secure and manage it in a way that complies with GDPR and the legal and lawful requirements of your organisation.

It's rare to find an HR supplier that doesn't treat data security just as seriously as you do. However, it's your duty to check —and to make sure the system will help you with your own compliance, too.

The following questions will help you to determine your shortlisted vendors' approach to data protection and security.

VENDOR DATA SECURITY & GDPR COMPLIANCE

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✓ Is your HR system/service UK and EU GDPR compliant?				
✓ Where is data hosted and backed up? Is it kept within the UK or EEA?				
✓ How long are backups kept for? Is deleted data permanently removed?				
✓ Who hosts my data? Are you working with a leading supplier like AWS or RackSpace?				
✓ Do you have independent security certification, such as ISO27001?				

VENDOR DATA SECURITY & GDPR COMPLIANCE

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ Do you have regular independent penetration testing in place to validate your data security measures?				
✔ Is data encrypted at rest and in transmission?				
✔ Can I set up different security roles for employees in different countries/parts of the business, so I can control what they can see or change?				
✔ Can I use single sign on or dual authentication?				
✔ What password policies can I enforce?				

MANAGING YOUR OWN GDPR COMPLIANCE

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ Can I provide secure self-service, so employees can see and update their own information?				
✔ Can changes be routed through single or multi-step approval workflows?				
✔ Can I track that employees have received, and sign to say they have read, key documents?				
✔ How are subject access requests managed?				
✔ Can I set up data retention policies to automatically delete or anonymise data in line with GDPR requirements and different requirements in different parts of our business, or is the process manual?				
✔ Is there a portal or central area where I can store documents –such as data security policies or compliance processes –for easy access by different sets of employees?				
✔ Can I set up alerts to send out automatic notifications when mandatory training or other activities need to be reviewed?				
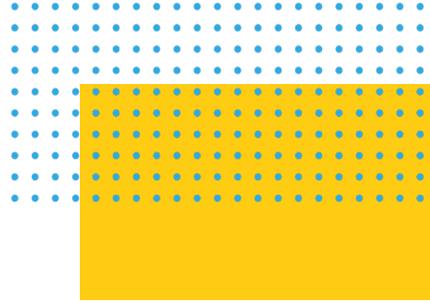
FOLLOWING THE 80:20 RULE

HR software should come with essential HR features, such as default security roles, workflows, notifications and data upload and reporting tools, already in the system.

The ideal HR system should have at least 80% of its' main functionalities virtually ready to use, so you can get started quickly.

You can then achieve the other 20% through configuration, so you can adapt the system to fit around your specific requirements and way of working.

THE 80:20 RULE

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ What data can you upload for me?				
✔ How much do you charge for data upload?				
✔ What security roles are already set up? How easy is it for me to add new ones?				
✔ What authorisation workflows are in place? Can they be tailored by me?				
✔ What notifications are in place?				
✔ Does the system come with standard HR reports, such as the Bradford Factor?				
✔ What interfaces do you have in place (e.g. to payroll or LMS)?				
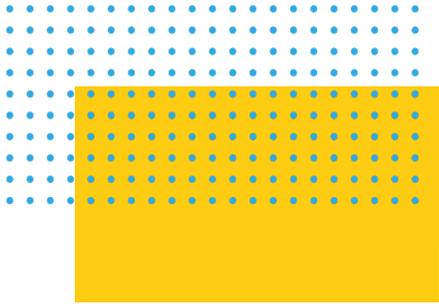
ADAPTING TO YOUR WAY OF WORKING

To be effective, HR software must support your way of working today, but also come with configuration tools that ensure it can be adapted to fit future requirements.

It's crucial to understand from the start what flexibility is built into the HR system, and how easy it is for you to change it to work the way you want it to.

The following questions will help you to understand if your shortlisted options will be able to adapt to your way of working both now and in the future.

ADAPTING TO YOUR WAY OF WORKING

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
✔ Can I create, save and schedule reports to run automatically?				
✔ Can I add my own forms with workflow authorisations?				
✔ Can I relabel or add fields?				
✔ Does it have editable functionality - such as fully configurable dashboards, editable colour schemes, custom terminologies / fields - and even the option to re-name it?				
✔ Can I create and distribute documents for e-signature?				
✔ Can I change authorisation workflows to route in different ways in different countries or operations?				
✔ Can I add new countries/languages/divisions/departments?				
✔ Do you have an API (which makes interfacing to third party applications more straight-forward)?				

UNDERSTANDING THE BUILD

Today, HR software systems are either Cloud hosted or Cloud native.

The former describe older single-tenant systems that have been adapted to run 'in the Cloud'. The latter are multi-tenanted solutions built from the ground up to take advantage of the agility and cost-efficiencies of modern Cloud infrastructures.

The key phrase to remember here is 'multi-tenanted'. A multi-tenanted system means that it can accommodate multiple customers in one platform, without endangering the security and privacy of each customer and their data.

The key benefits of multi-tenanted systems are that they are easier to scale and maintain, which makes them much more cost effective, and make adding new features a lot simpler. Customers usually benefit from lower costs and a continuous program of product enhancements that are automatically added to their system.

The following questions will help you to understand the build of your shortlisted software options, and their levels of sophistication.

SYSTEM SOPHISTICATION

	SUPPLIER 1	SUPPLIER 2	SUPPLIER 3	NOTES
Is your system multi-tenanted?				
Are all customers automatically updated with new features as soon as they are released?				
If not, how long do I have to wait to get new features?				
Do updates impact my configurations/customisations?				
Can your technology platform automatically scale in response to system demand? (load balancing)				
What processes are in place to keep my system up and running should a server fail? (fail-over support)				
Can I see your uptime report?				
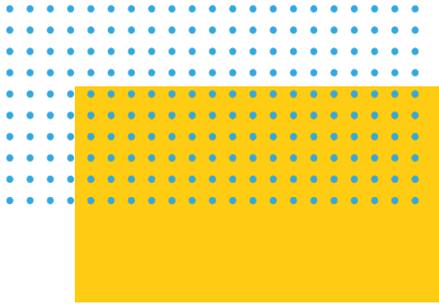
TAKING THE NEXT STEP

Most HR systems will cover the majority of HR's core processes: but you should equip yourself with a list of functionality and features that will make or break the project for you.

Think through some of your existing processes and check whether the system will support them.

Don't be afraid to share complex scenarios before any demo - it will give you a flavour of how flexible the HR system really is. Remember, if the sales consultant can't set the system up to work the way you need it to, the chances are it won't be easy for you either.

FURTHER READING

If you're in the process of evaluating HR software options, the following resources should also help guide you in making an informed decision.

Free guides

The HR software buyer's guide

This guide covers six of the most important areas to consider when evaluating a new HR system.

How to build a compelling business case for HR software

This guide takes you through every step of creating a convincing business case for HR software, enabling you to unlock the full potential of your HR initiatives

Transforming HR through automation

This guide takes you through the top processes you can automate with HR software for a more efficient experience.

Shorter reads

How to win support for a new HR system

Which HRIS software should you buy?

How technology can make you a better HR business partner

10 reasons people love Cezanne HR

Calculating the ROI of HR Software

Why your business should use ISO27001-certified HR software

7 features that will futureproof your HR software

HR software: How to ensure a smooth self-service rollout
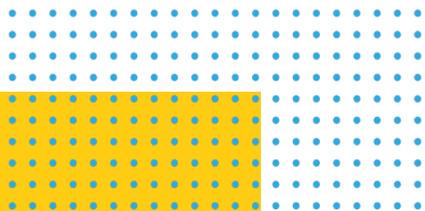
WHO WE ARE

Cezanne is one of the UK's favourite providers of modular HR software and payroll solutions. Trusted by thousands of people professionals across the UK and Europe, Cezanne is setting the standard for cloud HR and payroll software.

Depending on your needs, Cezanne can help with all aspects of people and payroll operations, including efficient recruitment and smooth onboarding, nurturing high performance and engagement, career & succession planning, DEI initiatives and HR analytics & reporting.

Perfect for companies with 50 - 3000 employees, Cezanne's platform comes with time-saving automation, easy adaptability, intuitive self-service & top-rated support from in-house experts. And, along with general HR operations, Cezanne also takes the pain out of payroll processing: automatically validating data, streamlining payroll calculations, and ensuring you have the reports you need, when you need them.

Certified to ISO27001, GDPR-compliant and available in multi-language formats, Cezanne helps businesses work smarter and achieve more as well as of course making HR and payroll professionals happier.

CORE MODULE

PEOPLE MANAGEMENT
Branded Dashboards
HR Portals
Kudos
Document Management
API

RECRUITMENT
ONBOARDING & LIFECYCLE
NEW MODULE
LEARNING MANAGEMENT SYSTEM
INSIGHTS
ABSENCE
COMPENSATION
TIME TRACKING
CAREER & SUCCESSION
SMART MANAGED PAYROLL
PULSE SURVEYS
IN-HOUSE PAYROLL
COMING SOON
PERFORMANCE
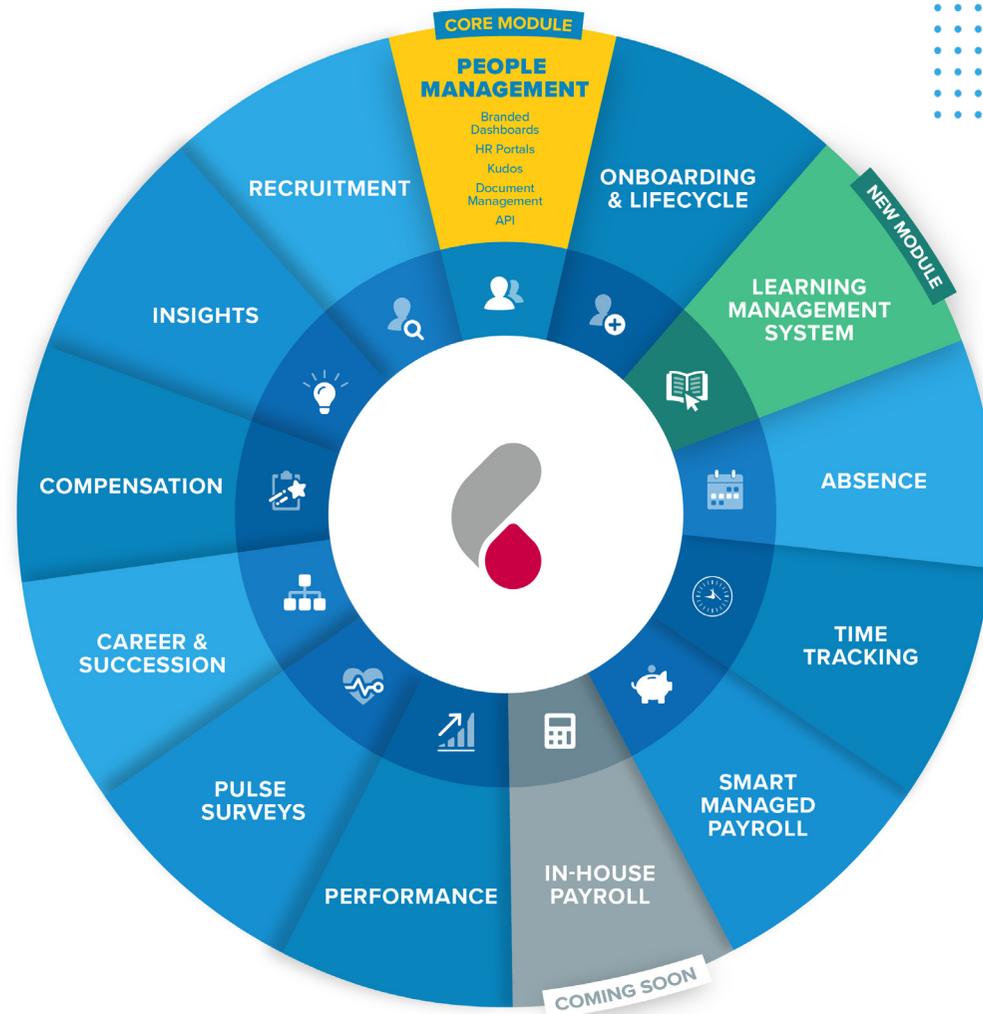
Book a demo

View some of our success stories