

HCM Selection Success Checklist

Your Roadmap to Confident HR Tech Decisions

Stop Wasting Time on the Wrong Systems

Many companies spend months in demos only to struggle to select the right HCM system. This strategic checklist helps you get clear on what you need before talking to vendors.

STEP 1: Internal Exploration

Get clear on your why before diving into demos.

☐ Identify Key Pain Points

What technology frustrations are costing you the most time? List your top 3 – 5:

1. _____
2. _____
3. _____
4. _____
5. _____

☐ Document Industry-Specific Needs

What unique requirements does your industry or company have?

- _____
- _____
- _____

☐ Review Your Internal Documents & Policies

Gather and update now to prevent implementation delays:

- | | |
|--|---|
| ☐ Employee Handbook | ☐ Benefits materials |
| ☐ HR policies | ☐ Performance review templates |
| ☐ Onboarding forms | ☐ Job descriptions |

☐ **Centralize Document Storage**

Create project folders on your computer drive to stay organized.

Storage location: _____

☐ **Build Your EDI and API Contact List**

Start a list of contacts for the technology that needs to integrate with your HCM system.

1. _____
2. _____
3. _____
4. _____

☐ **Review Your Budget**

Factor in all costs:

- | | |
|--|---|
| ☐ Software subscription | ☐ Training time |
| ☐ Setup and implementation fees | ☐ Ongoing support / maintenance |
| ☐ Data migration | ☐ Buffer for unexpected costs (10-15%) |

Preliminary budget: \$ _____ - \$ _____

STEP 1.5: Your Secret Weapon

The HR Tech Benchmark

See where HR automation works now and where it can deliver value.

The Market Payroll's exclusive HR Tech Benchmark Review:

- ☐ Identifies manual processes ready for automation
- ☐ Prioritizes features that deliver the biggest impact
- ☐ Creates your implementation and optimization roadmap
- ☐ Identifies who can oversee the HCM project

Without this: Lose time with generic demos, exploring features you don't need.

With this: Know what you need. Make the best use of time in demos.

Implement your system with confidence.

HR Tech Benchmark available exclusively when you work with The Market Payroll.

STEP 2: Peer Insights & Research

Learn from others' experiences.

☐ **Target Systems Built for Your Size**

The distinction matters:

Enterprise Systems:

- Feature-rich but often overcomplicated for mid-sized companies
- Longer implementation
- Higher costs and complexity

Mainstream Systems:

- Right-sized functionality
- Faster implementation
- Easier to use

Target systems designed for your 5- to 7-year growth trajectory.

☐ **Consider Local vs. National Support**

What matters to your company?

- ☐ Wisconsin-specific compliance expertise
- ☐ Regional partner who knows your business community
- ☐ National provider with 24/7 support
- ☐ Doesn't matter. It's the quality of support that counts.

Our priority: _____

☐ **Ask Better Reference Questions**

Speak with 2-3 references per vendor from different roles (HR leader, CFO, Controller, or end user).

Questions to ask:

- What's your role and how involved were you in selection or implementation?
- Did you choose this system or inherit it?
- What surprised you after go-live?
- What would you change if starting over?

STEP 3: Strategic Demo Process

Stay in control and make every demo count.

☐ Schedule Pre-Demo Analysis Call

Before each demo, be ready to share information that helps customize demos to your needs:

- Your primary goals for a new HCM system
- Your unique needs
- Your biggest concerns about switching
- Critical integration requirements
- Must-have features (deal breakers)

☐ Host 4 Targeted Demos

Schedule over multiple days, not one exhausting marathon.

Demo 1: High Level Overview

See full capabilities to understand what's possible

Demo 2: Employee Experience

Understanding how employees can answer their questions will save you time. Employees don't have to attend but give your full attention to what is all available to them as you'll be the ones explaining and trouble shooting.

Demo 3: Self-Guided Exploration

Create a checklist of system items you'd like to see in action. Your vendor can guide you through the screens through a demo account.

Demo 4: Manager Experience

Often the most interesting demo! Spending quality time with managers reveal future nice-to-have tech features. And it reveals broader organizational needs such as training opportunities, best practices and potential issues to address that haven't surfaced yet.

After each demo, capture:

- What impresses you most
- Biggest concerns or red flags
- Questions still unanswered
- Overall impression (strong yes / maybe / no)

Consider creating a simple scorecard to compare vendors objectively.

☐ **Confirm integrations**

For each system:

- ☐ Verify compatibility with existing systems
- ☐ Understand setup requirements and timeline
- ☐ Clarify ongoing integration support
- ☐ Identify any limitations or workarounds needed

BONUS: Post-Selection Implementation

Implementation is where your HCM system becomes a strategic advantage or another headache.

Essential Elements for Successful Implementation

☐ **Create Your Support & Implementation Directory**

Document key contacts:

- ☐ Implementation project manager
- ☐ Key contact beside project manager
- ☐ Payroll administrator
- ☐ Vendor support
- ☐ Escalation path for urgent issues

☐ **Establish Active Partnership Expectations**

Key elements to clarify upfront:

- Implementation timeline and milestones
- Your responsibilities vs. vendor responsibilities
- Regular check-in meeting schedule
- Decision points where input is needed
- Realistic target for go-live date

Have your policies and documents ready when requested to prevent delays.

☐ **Appoint Your Internal Project Champion**

Designate someone to:

- ☐ Serve as primary liaison with implementation team
- ☐ Update your team on progress
- ☐ Make or gather input for decisions
- ☐ Own post-launch optimization (the HR Tech Benchmark makes this easier)

☐ **Advocate for Adequate Time & Attention**

Don't let vendors rush you.

- ☐ Request additional training sessions if needed
- ☐ Ask for an extended implementation timeline if you need it
- ☐ Schedule time to test thoroughly before go-live
- ☐ Build in buffer time for unexpected issues

☐ **Plan for Post-Launch Optimization**

Go-live is the beginning, not the end. After the first payroll:

- ☐ Schedule monthly "mini projects" to implement new features
- ☐ Set up HCM optimization meetings for ongoing improvement
- ☐ Document lessons learned and process improvements
- ☐ Celebrate wins with your team along the way

Your Next Step

This checklist helps you avoid costly mistakes when selecting a HCM system.
But having a checklist isn't the same as having a partner dedicated to your success.

What if you could skip months of demos and work with a partner who:

- ☐ Vetted the systems. We've curated the 3 best-fit platforms for mid-sized Wisconsin companies.
- ☐ Presents the best-fit solution. Not countless generic demos, only one targeted recommendation.
- ☐ Stays with you the entire journey. Same person from selection through implementation and optimization (no handoffs, no repeating yourself).
- ☐ Provides an exclusive project framework. Aligns processes with technology before launch and guides post-implementation optimization.
- ☐ Partners for success after go-live. Unlimited year-one support and ongoing guidance to maximize your investment.

This is what The Market Payroll offers as a partner. We do the heavy lifting on evaluation. Are straight forward about what's possible. And stay by your side to ensure success.

Book Your Discovery Call Today

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