

# The HCM Buyer's Toolkit

> All the tools you need to find the best-fit solution

This toolkit has been designed to help you more efficiently navigate what can often be a complex buying process for human capital management (HCM) technology. The toolkit is a supplement to the HCM Buyer's Guide, which details how to find the best-fit HCM solution for your organization.

Worksheets in this toolkit include:

- **Worksheet 1: Current state and needs assessment**  
Use it to prepare for the interview process and get an accurate view of your organization's current state and needs.
- **Worksheet 2: Buying team organizer**  
Use it to keep track of potential candidates for the buying team from key departments. Fill in each role's key priorities and responsibilities in the buying process, and note some ideas for key questions that could be asked during the vendor-interview process.
- **Worksheet 3: User interview template**  
Use it to keep track of potential candidates to represent the employee, manager, executive, and administrator roles and to note ideas for key questions that could be asked when you interview these different types of users.
- **Worksheet 4: Table stakes checklist**  
Use it to ensure that the HCM platforms of the vendors being interviewed provide certain features.
- **Worksheet 5: Services checklist**  
Use it to identify the HCM vendor implementation and support services that will be important to the success of your platform choice.





## Worksheet 1 | **Current state and needs assessment**

Use this worksheet to prepare for the interview process and get an accurate view of your organization's current state and needs.

How long has it been since the existing technology you use for human resources (HR), payroll, time and attendance, recruiting, etc., was evaluated?

Less than 1 year     1–2 years     2–5 years     More than 5 years

When was the last time your platform was updated to reflect the latest changes to labor and tax laws?

---

---

---

Which departments do or would utilize your HCM platform?

HR     Payroll     Operations/Finance     IT     Other

What challenges do your different departments face on a daily basis when it comes to managing your HCM processes? Are there costs associated with these challenges?

---

---

---

What parts of your employee lifecycle rely heavily on paper processes and manual tools like spreadsheets or point solutions?

Recruitment     Hiring     Managing     Payroll     Employee retention



What level of importance would you give to enhancing different parts of your HCM processes? Rate from 1 to 10, with 10 being very important.

- \_\_\_\_\_ Recruiting
- \_\_\_\_\_ Employee onboarding
- \_\_\_\_\_ Time and attendance
- \_\_\_\_\_ Payroll
- \_\_\_\_\_ Benefits administration
- \_\_\_\_\_ Business insights/people analytics
- \_\_\_\_\_ Performance management/succession planning
- \_\_\_\_\_ Compliance laws
- \_\_\_\_\_ Post-payroll processing
- \_\_\_\_\_ Scheduling/workload management
- \_\_\_\_\_ Key productivity metrics
- \_\_\_\_\_ Data-related compliance standards

What are the short-, mid-, and long-term priorities you'd like to pursue?

---

---

---



## Worksheet 2 | **Buying team organizer**

Use this worksheet to keep track of potential candidates for the buying team from key departments. Fill in each role's key priorities and responsibilities in the buying process, and note some ideas for key questions they can ask during the vendor-interview process.

Department	Key priorities of the role	Key responsibilities in the buying process	Key questions for the interview process
<b>Human Resources</b>			
<b>Payroll</b>			
<b>Operations/Finance</b>			
<b>IT</b>			
<b>Other</b>			



## Worksheet 3 | **User interview template**

Use this worksheet to keep track of potential candidates to represent the employee, manager, executive, and administrator roles. Note some ideas for key questions that could be asked when you interview these different types of users.

Role	Questions to ask	Notes
<b>Employee</b>		
<b>Manager</b>		
<b>Executive</b>		
<b>Administrator</b>		



## Worksheet 4 | Table stakes checklist

Use this worksheet to ensure that the HCM platforms of the vendors being interviewed provide, at minimum, the features listed below.

Table stakes	Vendor 1	Vendor 2	Vendor 3
<b>Unified platform</b>			
The platform runs on one database.			
The data in the platform gets updated in real time.			
The reports and dashboards generated are native to the platform.			
The platform runs on a single employee record.			
Compliance is regularly updated across all major areas of the system.			
Only one browser location is required to access different parts of the platform.			
<b>User experience</b>			
The platform uses responsive design.			
The platform is viewable on a mobile device.			
Employee self-service is part of the platform.			
Manager features are clearly separate from employee features.			



Table stakes	Vendor 1	Vendor 2	Vendor 3
<b>Business insights</b>			
Standard reports and data visualizations are available throughout the platform.			
The platform can predict workforce trends and help influence them before they have an impact.			
Dashboards and analytic views are available throughout the platform for each major area of the HCM platform.			
Methods are available for setting up your system to perform based on benchmarks from other organizations in a similar industry.			
<b>Customer experience</b>			
The platform's customer success team is on hand from the moment you sign your contract to provide details and ensure your deployment is successful.			
The platform's deployment team is available to educate you on how to adjust the solution for your organization's specific needs.			
The support team smoothly picks up with a clear handoff plan where the deployment team leaves off.			
A dedicated support team that is well-versed in HCM skill sets is readily available.			
There is a starter kit or program in place to bring administrators quickly up to speed.			
A customer success team is regularly available to help administrators and other users get continuous value out of the HCM platform and to point to enablement resources.			
An online platform forum is available, where customers can build a community, get tips, find important announcements, contact support, and have questions answered.			





## Worksheet 5 | **Services checklist**

Use this worksheet to identify the HCM vendor deployment and support services that will be important to the success of your platform choice.

	Vendor 1	Vendor 2	Vendor 3
What is the vendor's deployment methodology?			
How involved is the deployment process?			
Does the vendor have an onboarding process for new clients to help with change management and to drive adoption of the unified HCM system?			
What educational services — both product and technical — does the vendor offer?			
Does the vendor offer a variety of learning tools and methods?			
How is the training delivered?			
On-site training			
Train-the-trainer			
Virtual learning			
Self-paced online tutorials			
Embedded learning			
Community forums			
Is ongoing training available for new personnel?			
Is there a starter kit or onboarding process available for new administrators?			
Are consulting hours available? If so, how many?			
How does the handoff from the deployment team to the support team work?			
What support services does the vendor offer?			
Live online support			
Customer community			
eCase support			
Formal escalation policies			
Flexible support plans			
Does the vendor offer professional services?			
What customer success options does the vendor provide?			
Does the vendor provide value-added HCM advisory services as part of its sales process?			



## **About Axiom Human Resource Solutions**

**Axiom helps employers manage their most important assets – their people – so more time can be spent on strategic initiatives. Our team of Human Capital Management technology experts and HR and benefits professionals work to protect and enhance the fiscal health of organizations so they can focus on strategic employee management initiatives.**

**Axiom experts provide cloud-based employee and workforce management applications with valued HCM technology partner UKG (United Kronos Group), UKG Ready (formerly Kronos Workforce Ready Suite) features powerful payroll, time and labor, risk management and benefits administration tools. To complete the spectrum of HR service and support, Axiom provides Human Resources Outsourcing and Risk Management services.**

