

Choosing the best HR software: Essential questions to ask at the Festival of Work

1. Getting a handle on costs

Licence/Subscription fees

What are the subscription/licence fees?	
What are they based on? E.g. fixed headcount, active headcount, modules taken, users etc.	
How are they 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

What set up services are included in the licence/subscription fee?	
What would a typical implementation for a company of our size cost (and what does that include)?	

How long would you expect it to take?	
Do you help with data upload?	
Are any of the configurations / customisations you make carried forward into future releases at no charge, or might they need to be redeveloped and recharged for?	

Training

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

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 (Standard Service Level Agreement)?	
What escalation processes are in place?	
Where are support staff based?	
What hours do they operate?	

Maintenance & Updates

What ongoing maintenance and update services do you provide as part of your licence/subscription fees?	
Do we automatically receive new features for our purchased modules as soon as they are released?	
How are releases managed?	
Are updates included for free? If not, what should I budget for annually?	

2. Considering contractual terms

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)?	

3. Securing data (& GDPR compliance)

Vendor data security and GDPR compliance

Is your HR system/service GDPR compliant?	
Where is data hosted and backed up? Is it kept within the 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?	
Do you have regular independent penetration testing in place to validate your data security measures?	
Is data encrypted?	
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

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?	
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?	
Can I set up alerts to send out automatic notifications when mandatory training or other activities need to be reviewed?	
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?	
How are subject access requests managed?	

4. Following the 80:20 rule

(80% of the core functionality you need should be in the system already – and the other 20% you should be able to achieve through configuration).

What data can you upload for me?	
How much do you charge?	
What security roles are already set up?	
What authorisation workflows are in place?	
What notifications are in place?	
Does the system come with standard reports, such as the Bradford Factor?	
What interfaces do you have in place (e.g. to payroll or LMS)	

5. Adapting to your way of working

Can I create, save and schedule reports to run automatically?	
Can I add my own forms with workflow authorisations?	
Can I set up my own security roles?	
Can I relabel or add fields?	

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?	
If my license/subscription is based on a fixed figure, what happens if I add more employees?	
Do you have an API (which makes interfacing to third party applications more straight-forward)?	

6. Looking under the bonnet

If you want to be confident of selecting the latest Cloud native technology platform, there are three simple questions you can ask:

Is your system multi-tenanted?	
Are all customers automatically updated with new features as soon as they are released?	
Can your platform automatically scale in response to system demand?	

If the answer is no to any of these, the chances are the supplier is on an older technology platform. That may not be a problem, but it will influence future costs and, at the very least, you will want to run it past your IT team.

It's also the case that most HR systems can be used from most mobile devices via a browser. If your HR application doesn't run as easily on a tablet or smartphone as on the office PC, you'll struggle to get everyone to use it.

Which browsers does the application support?	
Do you have native mobile apps? If so, for which operating platforms?	

Other useful resources:

[Buyer's Guide to Modern Cloud HR Software](#)

[Ten things to consider when choosing HR technology](#)

Customer case studies:

[ASL Aviation Holdings: Leading freight and passenger airline ASL takes to the Cloud to digitise HR](#)

[Award-winning investment management firm Triple Point invests in Cezanne HR to accommodate significant growth](#)

[Sir John Soane's Museum finds a flexible and cost effective HR system in Cezanne HR](#)