

Human capital management (HCM) RFP template

This template is designed to help HR and People leaders evaluate HRIS vendors. It combines functional HR requirements with IT, security, and compliance considerations. Use it as a checklist when issuing RFPs to potential providers.

Section 0: Your company snapshot

(Complete this so vendors understand your setup.)

- ☐ Company name
- ☐ Industry
- ☐ Total employees (domestic + global)
- ☐ Workforce type (salaried, hourly, contractors)
- ☐ Office locations (domestic + international)
- ☐ Current HR systems (HRIS, Payroll, T&A, LMS, etc.)
- ☐ Target go-live date
- ☐ Must-have integrations

Section 1: Company and vendor overview

- ☐ Provide company background, size, and geographic presence.
- ☐ Can you provide customer references in our industry and company size?
- ☐ What are the three biggest differentiators for your company?

Section 2: Core HRIS features

- ☐ Which of these features does your HRIS offering provide?
 - ☐ HRIS
 - ☐ Payroll
 - ☐ Time & Attendance
 - ☐ Scheduling
 - ☐ Learning Management
 - ☐ Global capabilities
 - ☐ Benefits
 - ☐ Other: _____
- ☐ Please explain through the process required to make an employee data change (e.g. change address, promotion).
 - ☐ Does the system automatically update across all modules?
- ☐ Does the system make downstream changes (e.g. update tax rates when address changes) automatically?
- ☐ What's the process of onboarding and offering on your system, including benefits, software app provisioning, and corporate cards?
- ☐ Please explain how employees can self-serve tasks such as PTO requests, paystub access, and directory lookups
- ☐ Does your system allow customized workflows?
 - ☐ If yes, what types of customizations are supported?
 - ☐ Can workflows be created across modules? (e.g. trigger across benefits to time and attendance)
 - ☐ Can workflows provide alerts and notifications?
 - ☐ Can workflows take actions (e.g. run payroll)? If so, which type?
- ☐ What validations are in place to ensure proper payroll processing (no termed employees, benefits match paystubs, address changes are included, etc.)?
- ☐ How can your team support us from a state registration, compliance and tax perspective when/if we enter new regions?

Section 3: Payroll and compliance

- ☐ In which US State(s) does your system offer payroll and compliance support?
- ☐ In which country(ies) does your system offer payroll and compliance support?
- ☐ Does your system allow hiring and paying of contractors?
 - ☐ If yes, in country(ies)?
 - ☐ Are these capabilities native or through partner(s)?
- ☐ How do you ensure compliance across federal, state, and local laws without manual tracking?
- ☐ Can your system automatically enroll employees in required compliance training based on their location?
- ☐ How do you help prevent wage and hour violations, including overtime and meal breaks?
- ☐ Can you generate compliance reports (EEO-1, W-2, 1099) instantly from the system?
- ☐ Can the system show multi-state and international payroll in a single view?

Section 4: Benefits administration

- ☐ What are the benefits administration process and services that your platform offers?
- ☐ How does your system simplify benefits enrollment and open enrollment for employees?
- ☐ Can workflows be tailored automatically by employee role or location?
- ☐ How do you integrate with carriers and brokers without manual workarounds?

Section 5: Employee experience

- ☐ Which of the following does your system offer?
 - ☐ Performance management
 - ☐ Feedback
 - ☐ 1:1s
 - ☐ Engagement surveys
 - ☐ Training (LMS)
 - ☐ Goals
 - ☐ Mobile
 - ☐ Employee chat/hub
- ☐ Can employees easily self-serve tasks such as PTO requests, paystub access, and directory lookups?
- ☐ What learning and development capabilities are natively available?

Section 6: Security & IT integration

- ☐ Does your system support single sign-on (SSO)?
 - ☐ Native or integrations?
- ☐ Please explain how permissions work on your system
 - ☐ Are permissions customizable? To what extent?
 - ☐ Do permissions automatically update when an employee changes roles?
- ☐ Which compliance certifications (SOC 2, ISO, GDPR) does your system hold?
- ☐ Does your platform integrate IT systems for device and identity management?
 - ☐ Are these integrations native or third-party?
 - ☐ Are integrations full 360 or one way?

Section 7: Analytics & reporting

- ☐ What are your systems analytics and reporting capabilities?
- ☐ Reports
 - ☐ How many pre-built reports are available?
 - ☐ To what extent are reports customizable?
 - ☐ Does customization require technical expertise or support?
 - ☐ Can reports combine data from across multiple HR modules?
(e.g. Payroll & performance mgmt)
 - ☐ Can reports combine data from across HR, IT, and Finance systems?
(e.g. Payroll, devices, corporate cards)
- ☐ Dashboards
 - ☐ How many pre-built dashboards are available?
 - ☐ To what extent are dashboards customizable?
 - ☐ Does customization require technical expertise or support?
 - ☐ Can dashboards combine data from across multiple HR modules?
(e.g. Payroll & performance mgmt)
 - ☐ Can dashboards combine data from across HR, IT, and Finance systems?
(e.g. Payroll, devices, corporate cards)
- ☐ Can audit logs and data exports be generated instantly to support compliance reviews?

Section 8: Implementation & support

- ☐ What's your average implementation time for a company our size?
- ☐ Do you provide a dedicated implementation manager for every customer?
- ☐ How large of an HR / payroll team is required to successfully implement and manage the platform?
- ☐ What are your SLAs for ongoing customer support?

Section 9: Cost of ownership

- ☐ Please explain cost savings seen typically by your customers
- ☐ How many different software can potentially be consolidated by adopting your system?
- ☐ Do you charge extra for automation, compliance enforcement, or integrations?
- ☐ What's your pricing model—flat, modular, or add-on driven?