New Dynamics

HR operations

HRIS selection and implementation: a practical guide

Choose an HR information system around your workflows, data needs and implementation capacity.

Practical guidance · Worked examples · Printable worksheet

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Inside this guide

Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Choose an HR information system around your workflows, data needs and implementation capacity. This practical guide to HRIS selection brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Define the decisions the system must support

An HR information system stores and coordinates people information. Start with the employee and manager tasks it must support: joining, role changes, absence, reporting or links to payroll. Rank the actual problems instead of starting with a long feature checklist.

Identify the authoritative source for each important field. If two systems disagree on reporting line or employment status, decide which one owns the value and how changes should flow. Software selection will not resolve unclear data ownership by itself.

Turn requirements into scenarios

Ask suppliers to demonstrate your work using fictional or approved sample data. Include ordinary tasks and difficult cases: a future-dated manager change, a corrected start date, a returning employee and an access change after a transfer.

For each scenario, record the users involved, required permissions, expected result and evidence shown. Distinguish functionality available now from a roadmap statement or a paid implementation task. Include accessibility, reporting and export needs in the same evaluation.

Evaluate the full operating commitment

Request current evidence about hosting, security controls, access, retention, subprocessors and incident response. Review contracts and privacy arrangements with the appropriate specialists. A logo or a general assurance statement does not establish that a control covers your intended service.

Compare setup, migration, integrations, training, support, recurring charges and exit arrangements using the same assumptions for every supplier. Identify your own implementation capacity. A product that needs more ongoing administration than the team can provide may be a poor fit even if its demonstration is impressive.

Worked example: a reporting-line change

Illustrative scenario: an employee changes manager halfway through a review cycle. The evaluation tests when the new manager receives access, what the former manager retains and how historical contributions remain available to the authorised reviewer.

The supplier demonstrates the change in a test environment. The team records gaps and checks connected systems. A simple “supports manager changes” response would not reveal whether the end-to-end process works.

Selection scorecard worksheet

- **Scenario:** What real task must the system complete?
- **Priority:** Is this essential, useful or optional, and why?
- **Evidence:** What was demonstrated or documented?
- **Gap:** What requires configuration, development or another product?
- **Owner and cost:** Who resolves the gap, with what effort and commercial terms?
- **Acceptance:** How will the organisation verify the result before launch?
- **Exit:** Can records be exported in a usable form and access ended cleanly?

Use scores only with recorded evidence and agreed weighting. Revisit the weighting if it rewards attractive features while ignoring a critical workflow.

Implement with explicit acceptance criteria

Clean data, test mappings and reconcile sample migrations before launch. Test permissions and integrations with representative users. Provide a fallback for critical activities and an owner for support during the transition.

Launch only when the agreed acceptance criteria are met or an authorised owner accepts a documented exception. Review adoption and recurring errors after launch. Use the software RFP template to structure supplier questions and the employee data guide to plan information handling.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Choose three events the system must handle: a starter, a manager change and a departure. Define the users, authoritative fields and expected result for each. Include connected payroll or identity systems where relevant. Ask which current problems are process problems and which genuinely require different technology.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Write acceptance tests that a supplier can demonstrate using sample data. Record the sequence of actions, required permissions and evidence of completion. Ask the supplier to distinguish standard configuration from custom work or a roadmap item. A feature name on a checklist should not be treated as a passed test.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Test a future-dated change that is corrected before it takes effect, or an employee returning after departure. Check duplicate records, historical access and downstream updates. Include an integration failure and ask who detects it, who resolves it and how the business operates while it is unresolved.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Give procurement and implementation owners a comparison based on evidence, cost and operating effort. Confirm which gaps need resolution before contract or launch. The handoff should include migration acceptance, training responsibility and exit requirements, rather than only a preferred supplier and a target date.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

What is the difference between HRIS and performance software?

An HRIS commonly manages core people records and HR processes, while performance software focuses on goals, feedback, reviews and development. Products can overlap, so compare the actual scope rather than relying on a label. Define which system owns each field and how information moves between them. The best fit depends on the workflows and operating capacity of the organisation.

Should we migrate all historical HR data?

Only after reviewing purpose, quality, access and retention. Old records may be incomplete, duplicated or inappropriate for the new system's audience. Decide what is needed, clean it and test mappings before migration. Reconcile samples and totals using agreed checks. Keep the handling of excluded or archived records explicit so they do not become an unmanaged collection outside the new platform.

What makes a useful supplier demonstration?

Use your scenarios and sample data, with clear expected results and permission requirements. Include corrections, exceptions and connected-system behaviour. Ask the supplier to show the work rather than answer only yes or no. Record what was demonstrated, what remains unverified and who owns each gap. Repeat critical acceptance tests in the implementation environment before launch.

Review the first cycle

Check the first live events against acceptance criteria and investigate recurring corrections. Ask employees and managers whether they can complete tasks without hidden manual help. Review integration failures and administrative effort alongside adoption. Update training or configuration based on evidence, and keep responsibility for core data definitions clear.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

New Dynamics connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete guide library for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation’s approved records. This page is for your own working notes.

Scenario: What real task must the system complete?

Priority: Is this essential, useful or optional, and why?

Evidence: What was demonstrated or documented?

Gap: What requires configuration, development or another product?

Owner and cost: Who resolves the gap, with what effort and commercial terms?

Acceptance: How will the organisation verify the result before launch?

Exit: Can records be exported in a usable form and access ended cleanly?

Discuss your next step with New Dynamics: contact@new-dynamics.com