



The HR assessment worksheet

Speak with the leadership team to get an understanding of where the organization is headed and what strategic objectives have been set forth for the coming years. From there, you can map their human resource initiatives to the successful execution of each one of these objectives.

Area	HR discipline	Questions to ask	Yes	No
Core HRMS	Recruitment and onboarding	• Can you systematically search internal and external candidates to find the “best person” for a position?		
		• Do you automatically move approved recruits to the on-boarding process without rekeying their data?		
		• Do you have a recruitment dashboard with metrics and targets defined?		
	Employee records and personnel actions	• Do you have a single-source of data for employee information?		
		• Does your HR system support a matrix supervisory structure?		
		• Can you submit, route, and approve employee changes electronically with one or more levels of approval?		
	Benefit administration	• Are all of your employee benefit enrollment and maintenance functions automated? Including life events?		
		• Do you offer benefit programs that distinguish your organization from others?		
		• Does the organization struggle with healthcare enrollment requirements?		
	Position management	• Do your managers have visibility to headcount allocations by position including budget variances?		
		• Are you capturing employees who work in multiple positions to accurately reflect roles?		
		• Are budget controls in place to help manage requisition approvals?		
	Payroll	• Does your time and attendance solution automatically generate time and schedules based on work rules and policies?		
		• Can you electronically route time approval with one or more approval levels?		
		• Is the time off accrual and tracking process automated and integrated with payroll processing?		
Expanded	Time and attendance	• Do you have the required occupational health components defined by position?		
		• Can you capture work-related injuries and incidents electronically?		
		• Can you also capture results and actions in the context of the injury/illness report?		
	Health and safety	• Does your current system allow you to define rule-based schedules taking into consideration skills, certifications, seniority, and workloads?		
		• Can you easily forecast scheduling needs and send notifications of available shifts based on scheduling rules and hierarchy?		
		• Do the executives have access to labor data in conjunction with operational metrics?		

Area	HR discipline	Questions to ask	Yes	No
Expanded	Scheduling and labor management	• Does your current system allow you to define rule-based schedules taking into consideration skills, certifications, seniority, and workloads?		
		• Can you easily forecast scheduling needs and send notifications of available shifts based on scheduling rules and hierarchy?		
		• Do the executives have access to labor data in conjunction with operational metrics?		
	Contingent staffing	• Does your organization rely on contingent staff to fill key and critical roles?		
		• Are there approval processes in place to control contingent staffing use and expenses?		
		• Do you track contingent staff alongside employees to truly understand who is performing work and where?		
Strategic talent management	Learning and development	• Do you know what the industry standard training hours per employee per year are for your industry?		
		• Have you ever conducted a cost-benefit analysis to determine return on investment for training programs?		
		• Is your learning and development program tied to the onboarding and succession programs?		
	Competency and career planning	• Do you have a centralized competency library that is used across all HR disciplines from recruitment to career development to succession?		
		• Do you have competencies defined by job and position across the organization?		
		• Are employees encouraged and empowered to maintain a talent profile?		
	Performance and goal management	• Do you have a formal process to link the organizational objectives to individual goals?		
		• Are you satisfied with the current process to manage and measure performance in your organization?		
		• Are performance appraisals tied directly to each employee's roles and responsibilities?		
	Compensation management	• Do you have a clearly defined and communicated compensation strategy (e.g., paying below mid with extended benefits and above mid for top talent)?		
		• Do you use variable pay components to drive specific outcomes and behaviors?		
		• Are the compensation processes automated with routings and approvals?		
	Succession planning	• Do you have career paths defined for all positions within your organization?		
		• Can you match individuals with specific position attributes to identify any readiness gaps?		
		• Do you have a formal mentoring program for succession into executive level positions?		
	Workforce planning	• Do you currently measure the retention rates of top performers?		
		• Do you currently report and analyze workforce skills and experience data?		
		• Has your organization performed an analysis of the differences between the present workforce and future needs to determine your priorities?		