# RFP template for HCM evaluation

RFP templates for human capital management (HCM) solutions have been long, extremely detailed and based almost exclusively on feature functionality. While effective a decade ago, this approach no longer aligns with modern HCM evaluations. Most solutions have similar basic capabilities, so feature functionality no longer drives the decision-making process. Instead, buyers are evaluating providers more holistically and basing their decisions on how vendors align and support organizations’ needs.

This template represents the major components of an HCM solution and focus on underlying technology, user experience, implementation, service and security. Questions are designed to identify strategic differences between vendors and help determine which partner provides the best overall fit. We encourage you to customize the questions to meet your specific needs.

If you would prefer a more detailed template with additional questions, your ADP salesperson can assist you in obtaining a modern one.

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# HCM Template Questions

# Strategic direction

How will you partner with us to develop and strengthen our HCM strategy into a competitive advantage?

Describe your scalability strategy and how the solution allows for growth.

How are you planning to incorporate artificial intelligence and/or machine learning into your solution?

Describe your strategic alliances and partnerships and how you use them to benefit clients.

How can your solution help us reduce cost and increase efficiency?

# Human Capital Management (HCM) solution overview

Provide an overview of your HCM solution, including how it can meet current and future client needs.

Provide a detailed overview of your solution’s architecture and hosting.

How do you integrate third-party applications with your solution? Which third-party applications are currently integrated? Is there a cost associated with integrating those third-party applications into your solution?

Please describe any advisory or consulting services that your organization offers to optimize your   
HCM solution. Is there an additional cost for those services?

What are your long-term development plans to enhance your solution?

# Human Resources (HR)

Provide a brief overview of your HR solution, including global HR capabilities.

Explain how your solution can help clients throughout the new hire, rehire and termination processes.

Describe onboarding capabilities and the ability to notify new hires of activities to complete.

Describe how your solution supports employees working in multiple concurrent positions.

Outline the process to transfer employees from one entity or pay group to another.

How does your solution accommodate FMLA tracking and/or administration?

# Payroll

Provide a detailed overview of your payroll solution, including steps and turnaround time to process payroll.

Describe the methods available for paying employees (e.g., direct deposit, pay card, or manual check).

Describe support for employees who concurrently work in multiple tax jurisdictions.

How do clients interface payroll with their general ledger (GL) financial system?

Describe your year-end process, W-2 support, and tax filing (including client and vendor responsibilities).

How will tax deposits and tax filing be handled? How do you handle inquiries, discrepancies and resolution for any federal, state or local tax inquiries?

Describe your global payroll offering.

# Benefits

Describe your health and welfare benefits administration functionality and its interface with your solution.

Explain the enrollment events supported by your solution (annual enrollment, new hire elections, life events and status changes).

How is eligibility reported to carriers? How are premium payments determined? Can you bill carriers and disperse payments?

Provide a brief overview of your leaves administration solution features and benefits.

Detail your typical process for handling a leave request.

Describe your coordination services with disability and worker’s compensation vendors.

# Talent acquisition

Provide an overview of your solution’s key recruiting activities and how it interacts with the HCM solution.

Describe how your solution can positively impact the candidate, recruiter and hiring manager’s experience.

How does your solution leverage HCM data to create requisitions?

Describe the ease of posting openings to an unlimited number of corporate talent sites, commercial job boards and external job aggregators.

Detail your candidate pre-screening or qualification process.

# Talent activation

Describe your talent activation solution, including the science and philosophy behind the solution.

What coaching tools are made available to managers when interacting with their teams? What coaching tools are made available to individual employees?

Do you have a core set of engagement questions that are included as standard in all engagement surveys?

Describe the employee-to-manager and manager-to-employee communication and feedback mechanisms associated with your solution.

Explain how your solution supports engagement surveys, including any tools that will help managers understand and improve employee engagement.

What tools or communications support engagement on an ongoing basis?

# Performance management

Provide a brief overview of your performance solution.

How can your solution help align goals across the organization?

Describe your ability to configure an end-to-end performance process, including varying review cycles, workflows, evaluation types, rating requirements, etc.

What competencies are delivered with your performance solution?

# Compensation management

Provide a brief overview of your compensation solution.

How can we apply rules and metrics to align compensation with our overall strategic initiatives?

Describe how budgets are allocated and allow for real-time tracking of budget dollars.

How can the solution help managers make effective compensation decisions?

# Succession planning

Provide a brief overview of your succession solution.

How are succession plans created?

How does your solution help managers identify potential successors and assess their readiness?

Explain how the solution can assist employees in career development planning.

# Learning

Provide a brief overview of your learning solution.

Describe how learning content is assigned to individuals or groups. Can it be set up to be assigned automatically?

Describe how the solution supports learning paths to improve employee development.

How does the solution help employees understand what learning is needed to help close competency or skill gaps?

# User experience

How does your solution enhance the employee experience and improve employee engagement?

Describe employee, manager and practitioner self-service capabilities.

Describe the benefits of your solution’s mobile capabilities.

How can your solution accommodate the changing workforce and allow us to meet the rise of temporary and contract-based employees?

Explain how your solution can provide a standardized, yet region-specific experience across all our geographic locations.

# Compliance

How can your solution help us abate risk when associated with taxes, garnishment, ACA and any other processes that are required for each of our locations?

Explain how your solution accommodates EEO, OFCCP, ACA, I-9 and other compliance reporting requirements.

How does your solution facilitate job safety tracking and OSHA reporting?

How can your solution assist us in identifying and capturing tax credits we may be eligible for?

Explain how your solution helps us in complying with global employment laws and regulations.

# Reporting and analytics

Describe standard and ad hoc reporting functionality. Please provide a list of available pre-built reports and metrics.

Describe your workforce analytics and benchmarking capabilities.

What kind of predictive analytics are available for managers and administrators?

What kind of modeling and forecasting are available now, and what can we expect in the future?

Describe your electronic/digital employee document management capabilities, document search and related reporting capabilities.

Describe your solution’s import and export data tools and capabilities, including mass data loads and bulk changes.

# Security

Explain how your solution’s security protocols keep our data and users safe.

How does your solution allow for user security? Describe your application’s security model.

Explain the different permission and security levels that can be assigned within the solution. How can these permissions be customized?

Does the analytics and reporting system use its own security, or can it leverage the HCM solution’s security settings?

# Implementation

Describe your implementation methodology and key milestones.

Describe the tenure and experience of your implementation team resources.

Do you leverage third parties to implement your solution? If so, please provide a list of approved third parties.

How would you handle a phased implementation approach? Would additional fees apply?

When are clients able to test solution features using their own data?

Describe your approach to initial client training and user adoption.

# Service

Once the solution has been implemented, who provides the service? Is it handled internally or by a third party?

What is your approach to customer success? How do you measure client satisfaction?

Describe your service delivery team. What are their operating hours and availability? Will a specific service contact be assigned?

How can clients contact your support staff and how are client inquiries managed until resolution?

What online tools and support do you offer clients?

# Company information

Briefly describe your organization’s business background, history and current financial health.

What is your average client retention rate and tenure?

What are your top competitive advantages as an organization?

When do you start billing for your fees?

What kind of long-term support and value-added services do you offer now and what are you developing?

This template is provided by ADP, Inc. to assist organizations in gathering the necessary information for a successful RFP as part of their HCM solution evaluation.