



HRNINJAS

Proud to be People Tech Partner

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Supplier Shortlist
for
The HR Ninjas

Covers basic concepts, guidance and more...

A Reference for the Rest of Us!



From last time...

A recap



In our previous sessions we've conducted **internal research** through **heat mapping**, **built a business case**, run a **"beauty parade"** to see what HR tech vendors are out there, started to internally work through the foundations of your new HR system, through looking at the **organisational structure**.



"Now you have a good idea of the type of vendors out in the market - it's time to put 2/3 vendors through their paces. To see if they really do meet your requirements"





Supplier Selection

So, you have been tasked with the job of finding out more about the HR vendors that were liked during the 'Beauty Parade'. Typically 2/3 vendors would be moved forward to this stage.

To objectively compare vendors, companies ask HR vendors to complete a document (called an RFP – [Request for Proposal](#)). This document details more information in relation to the project and is used to uncover the **strengths** and **weaknesses** of vendors.

This is an important document and will require an [investment in time to compile](#), but will be instrumental in selecting the right product for your organisation.

This is your opportunity to move away from sales blah into the 'nuts and bolts' of what the system can do. By detailing your requirements and asking the vendor to respond. Asking 'yes' or 'no' questions will be pointless, this is your opportunity to really understand the capability/limitations of the vendors. So try to be specific, and provide as much detail as you can.



Timeline

It's important to be really clear about the timeline with vendors and ensure that a clear process is in place.

Stage	Description
Ask vendors to sign an NDA	You will probably share some confidential information with vendors about your company. So you should think about asking vendors to sign an NDA.
Distribute RFP	Once the vendor has signed an NDA, email them the RFP with a schedule and all the information they need to give you.
Get confirmation & NDAs from providers that intend to participate	Some providers may rule themselves out because they cannot meet the requirements laid out in the RFP. The vendors who intend to participate to explicitly opt in by a certain date.
RFP deadline	This is the deadline for providers to submit their answers to you. You should allow a 'questions' phase here as well. Questions should be submitted to the person leading the RFP process, in a set template, and these questions and answers should be shared with the entire provider list to ensure that everybody has access to the same information.
Internal shortlisting period	You will want to run an internal process to shortlist to 2 providers based on the information you have been given. Using a scoring matrix.
Notify providers whether they have made the shortlist	Email providers informing them if they have been selected for the next stage. For those that have, schedule meetings for the next stage, ensuring that you explain who will be attending and what you will be looking for.
Follow-up meetings with shortlisted providers	Conduct follow-up meetings with your shortlisted providers.
Decision-making	Internal scoring and meetings to make the final decision.
Reference-checking, due diligence and further Q&A	Get customer references, perform due diligence on the company, and resolve any final questions with your chosen company.
Communicate final decision	Communicate the final decision to your shortlist; commence legal discussions with your chosen vendor



Evaluation Criteria

Rating the vendors against your criteria will help you to determine which vendors meet your business needs



Evaluation Criteria

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Capabilities

Solution Capability

Does the solution meet the including functions, process reporting.

Service Capability

Does the service meet the including processes, report management

Colleague Experience

How aesthetically pleasing is; Seamless access to mobile usability on various devices and minimal clicks.

Overall Feel / Satisfaction

Your overall feel of the total CSR and values

- 0 Does not meet current requirements
- 1 Barely meets current requirements (clunky usability or needs more work)
- 2 Meets current requirements (or will meet within time)
- 3 Exceeds current requirements (will improve our processes)
- 4 Meets/Exceeds current requirements (roadmap is aligned to future needs)

Solutions Comparison: Average Score

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Vendor	Solution Capability	Service Capability
Vendor 1	2.8	3
Vendor 2	3.3	1
Vendor 3		

Solutions Comparison: Comment

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Solution Option	Capability				Opportunity			Risk				
	Solution Capability	Service Capability	User Experience	Overall Feel	Roadmap Alignment	Flexibility/Configurability	Cost of Change	Business Change Impact	Supportability	Commercial Complexity	Architecture Complexity	Scalability
Vendor 1	Scores lowered by no Payroll and Reward capability	Excellent fit of our requirements they understand how we work	Very intuitive	"Really felt they understood our culture"	Some missing scores due to roadmap not being shown in SME session	Good workflow functionality	Roadmap aligned with Retail Good workflow functionality	"Very similar to our processes"	Covers non-operational time as well business as usual	Clear pricing model	Cloud based SaaS service, existing proven integrations.	Tech solution scalable and proven
Vendor 2	Excellent fit of our requirements at a detailed level	Slight concerns about service offering	Usability was excellent, looked good on mobile / tablet - extremely responsive. Branding was a great fit for us. Lots of options around SSO	Vendor both passionate and knowledgeable about system. Really good cultural fit for us, understands our business and proven success in our markets	New functions are available for us to switch on at the pace we desire and once we get there will be more new features.	Flexibility of landing page was superb. Facility to add new fields and be able to report on them immediately is very powerful.	So much can be done via configuration due to the way the product has been built. This will allow the HR function to continue to evolve the product without incurring high costs	Some change, but out of the box largely aligned with our processes. Only vendor with potential to have 'big bang' roll-out.	Good mitigations around codebase and size of org demonstrated.	Clear pricing model	Cloud based SaaS service, existing proven integrations.	Tech solution scalable and qualified.
Vendor 3												

KEY ■ Low risk / strong opportunity. A preferred approach.

KEY ■ Low risk / strong opportunity. A preferred approach. ■ Some risk / reduced opportunity. An approach for consideration. ■ High risk / weak opportunity. Approach to be avoided. ■ Not applicable to that particular group of evaluators.

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