



Playbook Series

Your Essential Guide to Buying HR Software in 2026

A step-by-step guide to finding HR technology
that drives both people and business success



When your employees trust their workplace, they commit to its success.

Regardless of your organization's size or industry, building a truly great workplace means going beyond traditional perks and benefits and focusing on something deeper: understanding your people. Trust, belonging, and strong performance all start with knowing what your employees really need and care about.

To achieve this level of workforce understanding, you need HR software that does more than just manage daily tasks. It should help you connect how your people feel with how your business performs, and then turn those insights into meaningful action. This is the key to building a workplace where everyone can thrive.

This guide will help you navigate the buying process for an HR solution to help you build a high-trust, high-performance workplace that empowers and motivates your people. You'll learn how to:

- Connect with stakeholders across your organization to make the best decision for all teams
- Accurately assess all business requirements
- Ask vendors the right questions to determine which solution can best meet everyone's needs
- Establish which technology, employee experience, and service standards your new solution should meet
- Plan your buying process with actionable tools and resources

Read on for everything you need to cut through the noise and find HR software that works best for you and your people.





What's the plan?

- Identify your needs
- Gather the right perspectives
- Ensure user adoption
- Define your essentials

Identify your needs

Making the right HR software choice for your organization starts with focusing on what really matters and finding a solution that works for all the stakeholders involved.

Begin by answering these key questions:

- Is now the right time for us to invest in new HR technology?
- Do we have a clear technology strategy in place as we start the buying process, and does it include our organization's employee trust and performance goals?
- What are our departments' most pressing daily challenges with managing our HR processes? What are the costs associated with these challenges?
- Which key elements of the employee experience do we want the solution to address?
- What level of importance should we give to enhancing different parts of our HR processes?
- Are we exploring how artificial intelligence (AI) can simplify or improve these processes?
- Are we operating in multiple countries or planning to expand globally, and do we need support for localization, compliance, and international payroll?
- What are the short-, mid-, and long-term priorities we want to pursue?
- What would success look like for us at the end of the buying process?

Explore these areas more fully in [Worksheet 1](#) to get an accurate view of your organization's current state and needs and to prepare for the vendor interview process.

High-trust workplaces have less than half the turnover of the typical U.S. workplace.¹

– Great Place To Work®

Finding the right tools for global growth

If your organization operates across borders, make sure your HR software can keep up. Look for solutions that:

- Support multiple languages and currencies
- Comply with local labor laws and data privacy regulations
- Deliver centralized reporting across countries

Whether you're expanding internationally or already managing a global team, your HR system should scale with your business and adapt to regional needs without adding complexity.



Previously, we had 11 different systems to manage payroll, and it was a complete nightmare. We now have 26 countries live on UKG One View in just two years.

Kandace Palmisano
Global Payroll Manager
Crane Worldwide Logistics



Gather the right perspectives

New HR software will affect many teams in your organization, so it's important to bring the right voices into the conversation early as you begin to evaluate and ultimately choose a solution. These should be key stakeholders who best understand the needs of the departments that will use the solution most.

Choose team members who can highlight current challenges and help shape how the new system can create better and more efficient people-first experiences. Think big: Your new HR solution should support the whole organization, not just one team. That means working together to define what's most important and making sure every vendor you consider can meet those standards.

If you do business globally, consider bringing in representatives from your international teams to make sure the software can meet regional requirements for compliance, language, and payroll.

Gathering perspectives from these functional areas will add value and help drive the best decision for your organization.

- Human resources
- Payroll/finance
- Operations
- IT

Complete [Worksheet 2](#) to choose your buying team members, define their roles, and identify key questions for each.



Human resources

At the heart of what matters most to your people.

Your HR team knows something others don't: which moments mean the most to your people. They understand that the best HR technology needs to go beyond basic features to connect what employees need and when. It also must align with what your business is trying to achieve, whether that's smarter hiring, better benefits, or performance tools people will actually use to drive impact.

When HR helps evaluate software vendors, they're looking through the lens of the real employee experience. They can spot which solutions will build trust, boost engagement, and deliver meaningful results. And HR can also ensure that the solution aligns with the organization's long-term business goals by identifying which features will support growth, retention, and changing workforce needs.

Refer to [Worksheet 2](#) for the full list of HR questions that will drive the most people-first vendor conversations.



While the technology itself is crucial to running our business ... it's equally as important to have a partner dedicated to helping us meet and exceed our goals. I love the UKG technology, but I truly love the company. The support we get has just been incredible.

Jack Klott
Vice President of Total Rewards
Independent Bank



Payroll/finance

The foundation of employee trust

Your employees trust you to pay them accurately and on time, so the HR software you choose must deliver error-free paychecks and handle tax payments and filings reliably.

Your payroll and finance leaders are essential resources in your HR solution selection process. If payroll sits within HR at your organization, their leaders will have the necessary functional expertise to add value to the process.

- Payroll leaders bring processing knowledge and can identify efficiency improvements.
- Finance leaders understand system integration, cash flow impacts, and reporting accuracy. They evaluate total cost of ownership and ensure compliance with financial controls.

Each knows how different payment methods enhance employee experience and can identify issues that could disrupt operations or employee satisfaction.

See [Worksheet 2](#) for a full list of vendor questions for payroll and finance that will generate the most accurate insights on the solution's pay and financial processes.

40% reduction in payroll processing time with the right payroll technology.²





Operations

Understanding where technology meets efficiency

Great HR solutions need operational input to manage teams effectively. Operations team members are closely familiar with scheduling, time tracking, workload management, and compliance. They spot bottlenecks and identify the best opportunities for automation and improvement.

Operations leaders provide vital insights when selecting workforce management solutions. They understand how scheduling conflicts disrupt production, which manual processes waste resources, and how inefficiencies impact the bottom line. They evaluate solutions based on real constraints, not just hypothetical benefits.

While HR provides people expertise and IT handles technical requirements, operations leaders ask the critical questions: “Will this help meet deadlines?” “Can supervisors use this during busy periods?” The best implementations happen when operations leaders work with HR and IT to find solutions that genuinely improve operational efficiency.

See [Worksheet 2](#) for key vendor questions that will help operations accurately assess solution process efficiency and system workflows.



It used to take hours for store managers to schedule their teams, and it was very difficult to forecast how many employees would be needed because we didn’t have reliable historical data. With UKG, managers worldwide can schedule their teams within minutes.

Doug Goehl
VP Customer Technologies
Crocs, Inc.





Information technology (IT)

Ensuring interoperability and security

Before investing in new HR technology, make sure it works well with the tools and systems your organization already uses. Involving IT early will help you accurately assess network security needs, data compliance requirements, system compatibility, and opportunities to simplify work.

Because HR systems handle sensitive employee data, security should be a top priority. Ask vendors about their data protection measures, security certifications, and breach response protocols. The solution should align with your industry's privacy regulations and have strong access controls to prevent unauthorized access. If you have a global workforce, ensure the vendor complies with region-specific data laws such as GDPR or APPI.

Also clarify how the vendor uses AI, both predictive AI for analytics and automation and generative AI (GenAI) for content creation. Make sure each is governed by safeguards, including user oversight, ethical use policies, and responsible data handling.

Refer to [Worksheet 2](#) for the best vendor questions to help IT effectively evaluate their systems, integrations, and data security.

3/4

workers in a UKG global survey said AI makes them more efficient and productive at work and enables them to spend more time on meaningful tasks.³

Ensure user adoption

Let's be real. Even the best HR technology won't make a difference to your processes, strategies, or future success if no one uses it. That's why, in addition to bringing together a team of experts who understand different departmental needs, it's also important to take time to learn what your employees really need from the tools they'll be using.

Here are the main workforce segments/roles to include in your HR solution buying process:

- Employees and managers
- Administrators
- Executives

Employees and managers

As part of your buying process, talk to employees and managers from different parts of the organization. Ask them how they use your current HR tools, what does or doesn't work for them, and what would make them most likely to use a new system.

Employees

Gain valuable employee insights by focusing on how often they use the system, what tasks they perform, and how easily they can access information. Understanding their challenges, such as when they need HR support, will highlight improvement areas. Also explore their technology preferences, device choices (e.g., mobile vs. desktop), and favorite app features to select solutions that align with employee needs and enhance the overall experience.

Managers

Ask managers about their access to essential information such as team performance, employee requests, and workforce data for decision making. Get a sense of how well they're supported when they have meaningful conversations with reports around growth, engagement, and retention. Also consider whether they have the right tools to track and act on employee feedback. Understanding time spent on approvals and administrative tasks, along with where better technology could lighten their workload, ensures the new solution will support both employees and the leaders guiding them.



Administrators

Even if your admins are already involved in the buying process, it's worth having a separate chat with them to understand their specific needs. You want to make sure the new system is easy for them to use, manage, and troubleshoot.

It's smart to speak with each admin group individually since they all bring varying expertise to the table. Your HR system administrators know the technical ins and outs of daily workflows. IT administrators understand how systems need to integrate and stay secure. Payroll administrators can spot compliance issues before they become problems. These one-on-one conversations often reveal important details that don't come up in larger group meetings.

See [Worksheet 3](#) for the full list of usage questions for employees, managers, and administrators.



Executives

When selecting HR software, you'll likely need sign-off from an executive sponsor. Check in with them and other relevant leaders to ensure the solution demonstrates clear value and provides reliable people data for informed decision making.

Stakeholders will have varying expectations based on their roles. C-suite executives focus on strategic oversight and organizational alignment, while department heads prioritize operational efficiency and day-to-day management capabilities. Board members emphasize governance and compliance features. At smaller companies, executives often wear multiple hats and prioritize cost-effectiveness and ease of implementation over extensive enterprise features. They prefer solutions that scale with growth while remaining manageable without dedicated IT support.

Understanding these distinct perspectives early in the selection process helps you choose a platform that satisfies all key decision makers.

See [Worksheet 3](#) for the full list of usage questions for executives.

Define your essentials

Now that you've assessed your organization's needs, gathered input from key stakeholders, and explored how to drive user adoption, it's time to turn those insights into a clear set of must-have solution requirements. These will help you build a high-trust workplace where everyone can succeed.

The following table summarizes the guidance from the previous pages to help you compare vendors and choose an HR solution that best meets your most critical needs for user experience, functionality, support, and long-term strategy.

As you meet with vendors, use these factors as your baseline:

Priority area	What to look for in a vendor solution	Associated stakeholder roles	Related worksheets
People-first design	Mobile-friendly, intuitive self-service; clear manager/employee UX distinctions; features that support work-life balance	HR, operations, employees, managers	Worksheet 3, Worksheet 4
Employee experience goals	Real-time insights into engagement and trust; benchmarks tied to retention and productivity	HR, payroll, finance, executives	Worksheet 1, Worksheet 3
Proactive guidance	Built-in people analytics, AI-supported predictions (e.g., flight risk, burnout), survey sentiment tools	HR, executives, managers	Worksheet 3, Worksheet 4
Flexible experience	Customization for different worker types, roles, locations, and departments; future-proof architecture	Flexible experience	Flexible experience
Seamless integration and security	Compatibility with existing systems, strong data protections, and minimal IT overhead	IT, payroll, administrators, executives	Worksheet 2, Worksheet 4
Global readiness (if applicable)	Multilingual support; international payroll integration; local compliance tools	HR, payroll, IT, operations	Worksheet 1, Worksheet 2
Partnership and support	End-to-end training, onboarding, community support, and managed service options (e.g., tax, payroll)	HR, payroll, administrators, executives	Worksheet 3, Worksheet 5



What to know about GenAI, AI, and AI agents in HR software

GenAI can simplify tasks ranging from writing job descriptions to analyzing feedback, but careful evaluation is key. Vendors may offer predictive AI for insights and automation, GenAI for content generation, and AI agents that can independently perform tasks or guide employees through processes. You'll want to clearly evaluate how each type of AI is being used and whether it's implemented responsibly.

As you compare vendors, dig into these four areas:

- Practical use: How is GenAI applied to real HR tasks, such as summarizing surveys, suggesting actions for managers, or answering employee questions?
- Human oversight: Can users easily review or adjust GenAI-generated content before it's used?
- Ethical and secure: What safeguards are in place to reduce bias and protect employee data? Is employee data used to train AI models?
- Enablement and governance: Do users receive training, guidelines, and clear governance policies for responsible AI use?

Choose a vendor that treats GenAI and AI agents as tools to enhance human decision making, not replace it.

UKG has not only gone all in on AI within its products, but it is utilizing AI across the business.

– 3Sixty Insights

Ready, set, go time

Bottom line? The right HR software should empower your people, not just manage processes. The best vendor for you will act as a true partner, providing expert guidance, training, and ongoing support to help your organization succeed and grow.

This guide equips you with practical tips, tools, and insights to navigate the crowded HR software market with confidence. It will help you find a solution that connects employee needs to business outcomes while creating exceptional experiences for everyone in your organization from the front office to the front line.

Learn more about UKG HR, pay, and workforce management solutions.

[Learn more](#)



Worksheet 1: Current state and needs assessment

Use this worksheet to prepare for the vendor interview process and get an accurate view of your organization’s current state and needs.

- When was the last time your current HR solution was evaluated?
- Is it still being supported by the vendor?
- When was it last updated with the latest changes to labor and tax laws?

Which of your organization’s departments use your HR solution?

- HR (primary user)
- Payroll/finance (critical functions; cost management)
- Operations (workforce management)
- IT (infrastructure and security)
- Other

What are the current daily challenges by department when managing HR processes?

Department	Primary challenge	Secondary challenge	Urgency (high, medium, low)
HR			
Payroll/finance			
Operations			
IT			
Other			



Evaluate and prioritize key workforce experience areas

Complete the table below to assess the effectiveness of your current HR processes, identify opportunities for improvement, and prioritize initiatives based on their potential impact on your ability to support your people.

- Current state: Briefly describe how each area currently functions.
- Desired state: Outline what great would look like for you in that area.
- Priority level: Select high, medium, or low based on how urgently each area needs improvement.

Workforce experience assessment

Experience area	Current state	Desired state	Priority level
Recruiting and hiring			
Onboarding			
Benefits administration			
Payroll accuracy			
Performance management			
Learning and development			
Employee sentiment and feedback			
Compensation			
Time and attendance			
Payroll and post-payroll processing			
People analytics / strategic guidance			
AI/GenAI usage			
Global readiness (if applicable)			
Compliance standards			
Scheduling / workload management			
Succession planning			

Strategic timeline planning

Short-term priorities (0–6 months)

- 1.
- 2.
- 3.

Mid-term priorities (6–18 months)

- 1.
- 2.
- 3.

Long-term priorities (18+ months)

- 1.
- 2.
- 3.

Worksheet 2: Cross-functional buying team strategy

Team makeup and expertise

Role	Team member	Key expertise	Buying process responsibility	Decision weight
HR		Trust strategy, employee experience	People-first evaluation	High
Payroll/finance		Processing, compliance, efficiency, accuracy, cost analysis, ROI, and global payroll strategy alignment (if applicable)	Payroll functionality evaluation; TCO, budget alignment, risk assessment	High
Operations		Budget, productivity, efficiency	Operational impact analysis	Medium
IT		Security, integration, infrastructure, global system scalability and localization support (if applicable)	Technical compatibility	Medium
Other		Strategic alignment, ROI	Final approval, budget	High



HR perspective: Employee experience

Primary focus: People-first solutions that build trust and belonging.

Vendor evaluation questions:

- How does the solution showcase our brand and employee experience to attract and engage top talent?
- How does the solution measure and improve employee retention and overall experience and ensure productivity and profitability for the organization?
- What insights does the solution provide to support strategic HR decisions and improve organizational productivity?
- Does the solution provide a seamless, fair, and intuitive hiring experience that flows smoothly into onboarding processes that engage new hires? Does it connect them with managers, teammates, and organizational culture?
- Does the solution give employees visibility into career advancement, learning, upskilling, and development opportunities, with AI coaching tools to help managers deliver these opportunities?
- How does the solution support personalized, role-specific performance management and continuous performance analysis?
- Are employee records centralized, flexible for different role types, and easy for employees to manage?
- What benefits strategies, benefits administration, and employee benefits evaluation and selection capabilities does the solution support?
- What's your approach to incorporating emerging technologies such as GenAI into your solution? How do you support HR in using these tools ethically to boost employee engagement and productivity?

Payroll/finance perspective: Accuracy, compliance, and cost-effectiveness

Primary focus: Perfect paychecks, seamless processing, and budget management

Vendor evaluation questions/payroll:

- How easy is it to set up your time rules with our payroll process to ensure accuracy?
- Can the system help us catch and fix payroll errors before they happen?
- When can we see payroll data during the pay cycle, and how quickly do updates appear?
- How does compliance fit into the payroll process, and how much upkeep does it need?
- Will the system guide us through each payroll step to ensure accuracy?
- What service options do you offer for areas where we need extra support?
- Do you offer earned wage access so employees can get their pay when needed, and does it support financial wellness?
- Will employees have 24/7 access to their pay info from any device?
- Can we track important trends like pay equity and use AI tools to analyze the data?



Vendor evaluation questions/finance:

- How are budget targets integrated and reflected across the solution, including labor cost vs. budget visibility?
- How easy is it to access real-time metrics such as productivity, actual vs. planned hours, and overtime control?
- Can you set alerts to keep overtime and other metrics within proper thresholds?
- How seamlessly does the solution integrate with our existing ERP, accounting, and financial planning systems?
- What forecasting capabilities exist for predicting future labor costs based on current trends and planned activities?
- Can you set up multiple budget scenarios and compare actual vs. planned labor costs across different departments, projects, or cost centers?
- How does the system track and report on labor cost per unit of output or productivity metrics?
- What financial dashboards and executive reporting capabilities are available for leadership visibility?



Operations perspective: Efficiency and ROI

Primary focus: Workforce management and bottom-line impact

Vendor evaluation questions:

- How many different worker types can be supported by the solution's time rules?
- Can you run separate processes for hourly and salaried employees at the same time?
- How intelligent is the scheduling system in forecasting workload needs, identifying coverage gaps, and accounting for skills, activity trends, and shift preferences?
- What compliance automation is built into time, attendance, and scheduling? Does the system automatically show key information, such as when employees qualify for leave under varying standards?
- How easy is it to onboard new employees or add staff from acquisitions?
- What self-service and mobile capabilities does the system provide for employees and managers to manage schedules, time-off requests, timesheet submissions, and approval workflows from any device?
- How does the system handle complex scheduling requirements such as rotating shifts, on-call assignments, and multi-location workforce management?

IT perspective: Security and integration

Primary focus: Technical infrastructure and data protection

Vendor evaluation questions:

- What system integration capabilities exist for connecting and sharing data with non-HR systems?
- How self-sufficient is the solution's cloud infrastructure, and how much ongoing support will be required from our internal teams?
- How frequently is the solution updated, and are all users automatically kept on the latest version?
- What managed service offerings are available to reduce the burden on internal IT teams?
- How does the solution support onboarding and continuous training for system administrators and broader users?
- How does the solution handle data protection compliance and user privacy, and does it align with relevant location and industry security standards?
- What ethical standards are followed in the development and use of AI within the solution?
- Does the solution provide real-time data and reporting to support smarter business and workforce decisions?
- What governance, oversight, and security controls are in place for the solution's predictive AI, GenAI, and AI agent features?





Worksheet 3: User segment analysis

Employee perspective: Daily interaction points

Key questions:

- How often do you interact with our current HR systems, and which tasks do you use them for most?
- How easy is it for you to access the employee information you need?
- How frequently do you rely on your manager, HR, or payroll to complete tasks or find information?
- Which workplace technologies do you find most effective, and which do you find most challenging?
- Where and how do you prefer to complete HR, payroll, and timekeeping tasks (e.g., mobile, desktop)?
- How important is mobile access for your role?
- What kinds of mobile apps do you enjoy using outside of work, and what features make them valuable to you?
- What additional capabilities would you like our HR technologies to provide to better support your life outside of work?

Manager perspective: Leadership tools

Key questions:

- How quickly and easily can you access team performance data, employee requests, and approvals?
- How well does our current system support you in identifying where to focus your attention with specific team members?
- Do you have coaching tools or receive guidance on supporting employee development, growth, and retention?
- What financial dashboards and executive reporting capabilities are available for leadership visibility?
 - How effectively are you supported in having proactive, productive conversations about employee goals, challenges, and engagement?
- How often do employees come to you with HR, payroll, or time-related issues, and do you have the system visibility to resolve them without involving other departments?
- How much time do you spend on administrative and approval tasks, and how easy are they to complete?
- Which of your day-to-day responsibilities could be improved with better technology?
- How do you currently measure and act on team sentiment and engagement feedback?
 - How easy is it to collect, measure, and analyze feedback and take meaningful action for stronger retention and performance?





Administrator perspective: System management

Representative selection criteria:

- Current HR system administrators: Technical expertise
- IT administrators: Infrastructure knowledge
- Payroll administrators: Compliance expertise

Key questions:

- How much customization would the HR solution need to meet our organization's specific requirements?
- Which current processes are most challenging, and how could a new HR solution help simplify or improve them?
- What would a stress-free implementation look like for you?
- What training and learning resources would be most effective for onboarding and ongoing use based on your preferred learning style?
- How important is access to user communities or forums for support and shared knowledge?
- Where would you prefer to go for help and problem resolution? Vendor support, forums, or other channels?
- What communication methods work best for accessing support when you need it?
- What routine or manual tasks would you like the vendor to automate or take off your plate through managed services?

Executive perspective: Strategic decision making

Representative selection criteria:

- C-suite executives: Strategic oversight
- Department heads: Operational leadership
- Board members: Governance requirements
- Small business executive: Cost, scalability, and ease of implementation

Key questions:

- Which people, work, and organizational trust metrics most influence your business decisions, and how do you typically use them?
- How do you currently access and visualize workforce analytics for planning and decision making?
- What role does culture data play in your strategic planning and the organization's business success?
- How do you measure the ROI of people-related investments?
- What predictive capabilities would help you identify trends and make more informed decisions?
- How well do organizationwide goals align with and influence departmental performance goals?



Worksheet 3: Define your essentials checklist

Use this worksheet to evaluate whether each HR solution under consideration meets the core requirements established in the Define your essentials section. Complete this to guide your comparison of multiple vendors and support confident, criteria-based decision making.

Essentials criteria	UKG	Vendor 2	Vendor 3
Is the solution mobile-friendly and does it provide intuitive self-service for both employees and managers?			
Does the system offer a seamless, intuitive user experience for all roles across the organization?			
Are there tools that support work-life balance and flexible scheduling for employees?			
Can the platform deliver real-time insights into engagement, trust, and workforce sentiment?			
Is the system designed with a people-first approach that includes trust benchmarking?			
Does the solution include AI-guided people analytics and sentiment analysis tools?			
Are predictive capabilities available to flag potential issues such as flight risk and burnout?			
Can workflows be customized for different worker types, departments, roles, and locations?			
Is the technology architecture scalable and built to support future growth?			
Does the system integrate securely with existing tools while minimizing IT overhead?			
Does the vendor comply with data privacy, governance, and security standards?			
Is the total cost of ownership fully transparent, including initial, ongoing, and long-term costs?			
Does the vendor offer comprehensive training and onboarding support for all user types?			
Can users access community forums and engage with peers for shared learning and support?			
Are ongoing managed services available, such as tax filing and payroll support?			
Is there a dedicated support model in place for post-implementation success?			

Worksheet 4: Services and support evaluation

Use this worksheet to evaluate the deployment, onboarding, training, and long-term support services offered by each HR solution vendor. It expands on the Define Your Essentials checklist by addressing the vendor support and enablement capabilities necessary for long-term success.

Service criteria	UKG	Vendor 2	Vendor 3
Does the vendor provide a clear and structured implementation methodology?			
Is support for onboarding and organizational change management included?			
Are product and technical training resources readily available?			
Does the vendor offer admin-specific training, certifications, or tailored learning paths?			
Are multiple training formats available (e.g., virtual, in-person, self-paced)?			
Are onboarding resources provided specifically for new system administrators?			
Can we access consulting hours or advisory services during implementation and beyond?			
Is there a defined support handoff from implementation teams to ongoing service/support teams?			
Are ongoing support services provided, including ticketing systems, escalations, and dedicated support channels?			
Are self-service support tools like a knowledge base, chatbots, or guided help available?			
Does the solution include access to a user community platform for engagement and peer collaboration?			
Are customer success managers available to help drive strategic value over time?			
Does the vendor offer enablement tools to promote user adoption and keep users informed about new product releases?			
Can we participate in conferences, customer events, or ongoing learning communities hosted by the vendor?			
Is advisory support available for M&A activities and broader engagement initiatives?			
Does the vendor provide configuration and system customization support after launch?			
Is there a defined process for security and data incident response, including customer communication protocols?			
Does the vendor support AI/GenAI enablement with user training, ethical usage guidance, and governance safeguards?			

Final recommendation matrix

Weighted scoring model

Scoring instructions:

Use this matrix to compare HR software vendors based on your top priorities by following these quick steps:

1. Assign weights
Give each category a percentage based on its importance to your organization. All weights must total 100%.
2. Score each vendor (1–5)
Rate from 1–5 how well each vendor meets the category with 1 = Poor and 5 = Excellent.
3. Calculate weighted score
Multiply each vendor’s score by the category weight (as a decimal). Example: 4 (score) × 0.25 (25%) = 1.0
4. Add it up
Add all weighted scores per vendor. The highest total suggests the best fit.

Pro tip: Use your completed worksheets for support and adjust weights if needed to reflect specific goals (e.g., security, AI, cost).

Evaluation category	Weight (%)	UKG score x weight %	Vendor 2 score x weight %	Vendor 3 score x weight %
Example	25%	5 x .25 = 1.0	3 x .25 = .75	2 x .25 = .5
Onboarding Employee experience goals / People-first design				
Proactive guidance and insights				
Flexible experience				
Partnership and support				
Security and compliance				
Total cost of ownership				
Total score:	100%			

Decision summary

Recommended vendor:

Key differentiators:

Implementation timeline:

Success metrics:

References:

- 1 Great Place To Work, Trust Over Employee Engagement: The Metric That Predicts Retention, Innovation, and ROI (July 2025), found at <https://www.greatplacetowork.com/resources/blog/why-trust-beats-employee-engagement>.
- 2 Global Journal of Engineering and Technology Advances, The technical evolution of payroll systems: From manual processing to intelligent automation (2025), found at <https://gjeta.com/sites/default/files/GJETA-2025-0103.pdf>.
- 3 UKG, AI at Work: It's Here and It's Working. Whether You Know It or Not (October 2023), found at <https://www.ukg.com/about-us/newsroom/ai-work-its-here-and-its-working-whether-you-know-it-or-not>.

About UKG

UKG is the workforce operating platform that puts workforce understanding to work. With the world's largest collection of workforce insights, our ability to reveal unseen ways to build trust, amplify productivity, and empower talent, is unmatched. It's this expertise, along with our people-first AI, that equips our customers with the intelligence to solve any challenge in any industry — because great organizations know their workforce is their competitive edge.



HR, Pay, & Workforce Management

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