

Free Checklist: Is Your HRIS Really Meeting Your Business Needs?

Your HRIS should be making work easier, smarter, and more scalable—not creating workarounds, frustration, or data chaos.

Use this checklist to objectively assess whether your current HRIS is truly supporting your business, or quietly holding it back.

How to use this: Work through each section honestly. If you're unsure about an answer, that's often a sign something needs attention. Consider involving your payroll team, managers, and IT in this assessment for a complete picture.

1. Alignment with Business Needs & Strategy

Your HRIS should serve your business model, not the other way around.

- Our HRIS supports our current workforce size and structure
- It handles our workforce complexity (shift workers, casual/ permanent mix, multiple locations, award variations)
- It can scale easily as we grow or restructure
- It aligns with our industry-specific requirements and compliance obligations
- It supports our strategic business goals (efficiency, cost control, workforce insights, employee experience)
- Leadership can access the workforce data they need for decision-making without waiting for HR to create reports
- The system has adapted as our business has changed (or we know how to make it adapt)

Red Flags

- "We've outgrown the system but keep using it anyway"
- "It works for some parts of the business but not others"
- "We chose it 5+ years ago and our business looks completely different now"

If your business has evolved but your system hasn't, it may already be outdated.

2. Process & Workflow Efficiency

A good HRIS automates work, it doesn't just digitise manual processes.

- Key HR processes are genuinely automated
- Payroll runs are efficient, accurate, and low-risk
- We rarely (if ever) need to export data to Excel to manipulate it
- Onboarding is smooth, consistent, and creates a good employee experience
- Offboarding is complete and reduces compliance risk
- Leave management is straightforward for employees and managers
- Approvals are simple, trackable, and don't get stuck
- We don't rely on regular workarounds to complete standard tasks
- Exception handling (errors, edge cases) doesn't require manual intervention every time

Red Flags

- "We have to do [task] manually every single pay run"
- "The system can't handle [common scenario] so we work around it"
- "It takes longer to do things in the system than it did the old way"

A good HRIS should simplify work, not recreate broken processes digitally.

3. Essential Functionality

Are you paying for what you actually need and use?
Ask yourself honestly:

- The system covers our true must-haves (not just nice-to-haves)
- We regularly use the core functionality we're paying for
- Critical tasks are intuitive and easy to complete
- The features we need most work reliably
- We're not paying for modules or features we never use
- Award interpretation (if applicable) is accurate and automated
- Compliance reporting meets our actual obligations (STP, WorkCover, Fair Work, etc.)
- The system handles our edge cases without constant customisation

Red Flags

- "We pay for the full suite but only use 3 modules"
- "It has lots of features but none of them do exactly what we need"
- "We're constantly requesting customisations"

More features ≠ better system. Fit for purpose always wins.

4. Integration with Your Tech Ecosystem

Disconnected systems = data chaos, double handling, and frustrated employees.

- Our HRIS integrates smoothly with payroll (if separate)
- Integration with finance systems works reliably
- Time and attendance/rostering data flows cleanly
- Recruitment platform feeds into onboarding without manual data entry
- Learning management system (if we have one) connects for compliance tracking
- Single sign-on works across our HR tech stack
- We avoid double-handling data between systems
- We don't manually reconcile data between systems every pay run
- Integrations don't break regularly or require IT
- Data flows in real-time (or near) where it needs to

Red Flags

- "We export from system A, manipulate in Excel, then import to system B"
- "Our integrations break every time there's an update"
- "Finance gets different numbers than HR"

Your HRIS doesn't operate alone. Poor integrations create more problems than they solve.

5. Data, Reporting & Insights

Your HRIS should be a source of insight, not just storage.

- We can easily access accurate, up-to-date workforce data
- Standard reports are easy to generate (without IT)
- Custom reports can be created when needed
- Leadership actually uses HR data to inform strategic and operational decisions
- Compliance reporting (STP, WorkCover, Fair Work) is reliable and automated
- We can quickly answer questions like "What's our labor cost by department?", "What's our turnover by location?"
- Data is consistent across different reports
- We trust the data that comes out of the system
- Historical data is accessible when we need it
- We can forecast and model workforce scenarios

6. Selection Process & System Fit

Was your system chosen strategically, or opportunistically? Think back to your selection process.

- Our system was chosen based on clear, documented business requirements
- Selection was evidence-based, not primarily influenced by sales demos or vendor relationships
- The system was tested against our real workflows before purchase
- Multiple stakeholders (HR, payroll, IT, end users) had input
- We evaluated total cost of ownership, not just license fees
- We considered integration requirements during selection
- We can clearly articulate why this system was the right choice for our business
- The system has delivered on the promises made during the sales process



Red Flags

- "We spend hours compiling reports manually"
- "The data doesn't match between reports"
- "We don't trust the numbers"
- "Leadership never asks for HR data as it's too hard to get"

If you can't get insights out of your system, it's just an expensive filing cabinet.

Red Flags

- "We chose it because everyone else uses it"
- "The demo looked great but the reality is different"
- "We went with it as we already use their other product"
- "It seemed good, but we're not sure why we chose it"

How you chose your HRIS shapes how it serves you. Rushed decisions often lead to poor fit.

7. User Experience & Adoption



Even powerful system fails if people won't use it properly.

- Employees find the self-service portal intuitive and actually use it
- Managers can confidently complete their tasks (approvals, reporting) without constant support
- The payroll team doesn't dread using the system
- HR spends time on strategic work, not fixing user errors or answering "how do I..." questions
- Training and support were sufficient during implementation
- Ongoing help resources are available and useful
- Mobile access works well (if needed for your workforce)
- The system rarely goes down or has performance issues
- User feedback about the system is generally positive
- Adoption rates are high across different user groups

Red Flags

- "Managers still call HR to do things they should do themselves"
- "Employees complain that the old system was easier"
- "We provide the same training over and over"
- "Half our workforce doesn't use self-service"

Technology is only as valuable as people's willingness and ability to use it.

8. Future Readiness & Scalability



Can your system grow with you, or become a constraint?

- The system can handle our projected growth over the next 3 years
- It can accommodate increased workforce complexity (new employment types, locations, business units)
- It supports evolving ways of working (hybrid, flexible, remote workforce management)
- The vendor regularly updates & improves the platform
- The vendor is financially stable with a product roadmap
- We're not already planning to replace it
- Adding new functionality or modules is feasible if needed
- The per-employee cost model makes sense as we scale
- It can handle potential geographic expansion
- Regulatory and compliance updates are managed by the vendor without major effort from us

Red Flags

- "We'll need to replace this when we reach [milestone]"
- "The vendor hasn't updated the product in years"
- "It works now but won't handle what's coming"

Think long-term value, not just whether it works today.

9. Cost & Value (New Section)



Are you getting ROI, or just paying bills?

- We understand the total cost of ownership (license + support + maintenance + internal resources)
- The value we receive justifies the investment
- We're not paying for significant unused functionality
- Hidden costs (customisations, integrations, additional licenses) haven't spiralled
- The system has delivered measurable time savings or efficiency gains
- We can quantify the ROI (even roughly)
- The pricing model is transparent and predictable
- We could articulate the business case for keeping this system to leadership

Red Flags

- "We're not sure what we're actually paying for"
- "Costs keep increasing but value hasn't"
- "We can't point to concrete benefits"

Technology should deliver measurable value, not just costs.

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Your Results Guide

Count your ticks and blanks, then see where you land:

Mostly Ticks (70%+)

Your HRIS is likely supporting your business well.

Next steps:

- Focus on optimisation: Are there features you're not using that could add value?
- Check adoption: Are all user groups getting the most from the system?
- Future-proof: Review your 3-year plan and ensure the system can scale with you
- Document what's working well to inform future decisions

Mixed Results (40-70%)

Your system may be underutilised, misaligned, or partially fit-for-purpose.

Next steps:

- Identify specific gaps: Which sections had the most blanks?
- Assess if issues are with the system or how you're using it
- Consider whether optimisation, better training, or improved integrations could close gaps
- Evaluate whether the system can be configured differently to better meet needs
- Determine if you're getting ROI or if costs outweigh benefits

This is the danger zone. You might be living with a "good enough" system that's actually costing you more than you realise in lost productivity, workarounds, and missed opportunities.

Lots of Blanks (Under 40%)

Your HRIS may no longer be fit for purpose and could be creating inefficiencies, compliance risk, and strategic limitations.

Hard truth: You're likely spending time, money, and energy working around your system instead of being supported by it.

Next steps:

- Quantify the pain: How many hours per week are spent on workarounds? What's the error rate?
 - What decisions can't you make?
- Calculate the cost: Manual effort, compliance risk, lost opportunities, and employee frustration
- Assess urgency: Is this a "fix soon" or "fix now" situation?
- Consider whether optimisation is possible or if replacement is the better path
- Don't rush the next decision, invest in a proper selection process

Additional Diagnostic Questions

Still unsure? Ask yourself:

- If we were choosing a system today, would we choose this one again?
- How often do we say "the system can't do that" or "we have to work around it"?
- Would our business be measurably better with a different system?
- Is the system enabling our people strategy, or constraining it?
- When was the last time we reviewed whether this system still fits our needs?

Want an Expert Assessment?

At Zest, we help organisations:

- Conduct objective HRIS Health Checks, which are an independent assessment of what's working
 - and what's not working
- Map current processes and identify inefficiencies, quantifying the real cost of system gaps
- Optimise existing systems, ensuring you get more value from what you already have
- Select the right-fit technology, with an evidence-based approach that prioritises business outcomes
- Support implementation and adoption, ensuring your investment delivers results

Book an HRIS Health Check

Get an independent, objective view of whether your current system is truly serving your business, and what to do about it.

Get in touch

