

47

QUESTIONS · 9 SECTIONS

WORKSHEET · HRIS VENDOR EVALUATION

# 47 questions to ask any HRIS vendor before you sign.

The questions a 25-year operator asks. Pricing, implementation, data ownership, exit terms. Use it on your next four demos. You will catch what the brochures do not say.

9 SECTIONS | 47 QUESTIONS | ~30 MIN PER DEMO

# An actual worksheet, not a sales sheet.

Take this into your next vendor demo. Ask the questions in order. Listen for the shape of the answer, not the brochure version. The questions are organized by the moments where buyers lose the most money: data architecture, implementation, pricing, exit terms.

Each question has a **Listen for** line. That is the part you skim during the demo while the vendor is talking. It tells you what a real answer sounds like and what a sales-deflection sounds like.

## The 9 sections

- **1. Data architecture (5).** Where the employee record actually lives. The deepest predictor of integration cost over the next five years.
- **2. Implementation (6).** Timeline, ownership, what falls on you. Where 80 percent of failed deployments break.
- **3. Pricing and contract terms (7).** Year 2 cost, term length, exit clauses. The brochure number is rarely the bill.
- **4. Compliance and country coverage (6).** Live in production vs "on the roadmap." Statutory rate maintenance.
- **5. Integrations (4).** Which ones the vendor owns when they break, and which fall on you.
- **6. Data ownership and exit (5).** What you can take with you, in what format, on what timeline.
- **7. Security and SOC 2 (4).** The actual audit report, not the cover letter.
- **8. Support and escalation (4).** Time zone, escalation path, account ownership.
- **9. Roadmap and customer voice (4).** Reference customers, churn rate, tenure.



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### Marketing & Sales Operations, Workzoom

WORKING WITH HR AND PAYROLL TEAMS ACROSS CANADA, THE US, THE BAHAMAS, AND THE UK

This worksheet was built from 25 years of Workzoom (formerly Nortek) configuration conversations with HR and payroll teams. The questions are the ones we wish every buyer asked their other shortlisted vendors. Some of the answers favor us. Most just favor you.

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## 01 Data architecture

5 QUESTIONS

Q 1

**Open one employee record live in the demo. Walk every screen where that record is read or written. How many separate databases is this hitting?**

**Listen for:** "One database" is the right answer. "Integrated" or "synced nightly" or "shared identity layer" means the data lives in multiple places and reconciliation becomes your problem.

Q 2

**When I change a status from active to leave in HR, how long before that propagates to Payroll, Scheduling, Time, and Benefits Administration?**

**Listen for:** "Immediately, on the same record" is connected. Any answer with "the sync runs every" or "you can configure the interval" is coordinated, not connected.

Q 3

**Show me where the audit trail of changes to an employee record lives. One log across HR, Payroll, Scheduling, and Talent, or one log per module?**

**Listen for:** One audit trail is the architecturally correct answer. Multiple per-module logs mean you cannot reconstruct what happened in a dispute without manual reconciliation.

Q 4

**If I make a change in Payroll (rate change, retroactive adjustment), does the HR record see it? Is the data flow two-way, or only HR-to-Payroll?**

**Listen for:** Two-way visibility on the same record is the goal. One-way flow means Payroll has its own truth and HR is left guessing.

Q 5

**Is "Person" one entity, or do I have separate Employee, Worker, and Contractor records that need to be reconciled?**

**Listen for:** One person entity that handles employment-status transitions is the clean answer. Multiple record types mean an employee who converts from contractor to full-time gets a brand new identity and loses their history.

## 02 Implementation

6 QUESTIONS

Q 6

**Walk me through your last three implementations of organizations my size. Who was on it, how long did it take, and what went sideways?**

**Listen for:** Specific names, specific timelines, specific problems. A vendor who cannot describe a recent project that went sideways either has not done one (unlikely) or is hiding it.

Q 7

**What is explicitly NOT included in the implementation price? Data migration, custom report rebuilds, integration setup, training, change management?**

**Listen for:** Every "extra" should be priced in writing in the SOW. Anything answered with "we usually" or "that depends" is going to be a change order later.

Q 8

**Who specifically will be on my implementation team? Names, titles, contact info. Not "your dedicated team."**

**Listen for:** Real people. If they refuse, it means a rotating cast of consultants who will ask you the same discovery questions for the first three months.

Q 9

**What happens to my project if the implementation lead I am meeting today leaves the company in month 4?**

**Listen for:** Documented handoff process, named backup, and visibility into project state. Vague answers here mean a stalled project when (not if) the lead departs.

Q 10

**What is the longest implementation you have seen, and what is the average for a company of my size and industry? Show me both with real numbers.**

**Listen for:** Industry average for enterprise HRIS is 14 months (Sierra-Cedar). Anything significantly longer is a red flag. Anything significantly shorter without an iterative model is a sales claim.

Q 11

**Can I phase this in (payroll first, scheduling next, performance later), or is this one big-bang go-live across every module?**

**Listen for:** Iterative phased rollout reduces risk, gets to first value in 30 days, and survives the inevitable mid-project staff change. Big-bang implementations are where careers go to die.

Q 12

**What does this cost in year 2 vs year 1? Include any inflation escalator, license tier changes, and per-employee adjustments.**

**Listen for:** A specific year-2 number in writing. Anything that triggers a renegotiation in 12 months means the year-1 price was a teaser.

Q 13

**What is the minimum commitment? Month-to-month, annual, or multi-year? What is the early-termination clause?**

**Listen for:** Month-to-month is the cleanest answer. Multi-year contracts with no early-out clause are how you stay paying for a system you stopped using in month 8.

Q 14

**What features are excluded from this price tier? Show me the matrix of what is included vs what is "available" but billed extra.**

**Listen for:** A printed feature matrix. The features they demoed today should all be in your tier. Anything in a higher tier becomes a sales call in month 6.

Q 15

**Is the per-employee count based on actively employed, total HR records, or system seats? How does that number change as we hire and terminate?**

**Listen for:** Active employees only, recalculated monthly, is the operator-friendly answer. "Total records" means you pay for ten years of terminated employees you cannot delete.

Q 16

**What is the cost to add a new country or payroll jurisdiction in 18 months? Show me the price list for the markets I might expand into.**

**Listen for:** A clear per-country rate. "It depends" or "we would scope that" is a deferred sales conversation you do not need yet.

Q 17

**Are there separate fees for support tiers, premium support, dedicated account manager, or product training?**

**Listen for:** A complete list. Anything you have to ask about today is something you will pay for tomorrow.

Q 18

**What is the cost to integrate with my three critical systems (GL, benefits broker, learning platform)? Per integration, per direction, per year?**

**Listen for:** A named price, not a "depends on the scope." Integration scoping that gets deferred to a statement of work is where the brochure price doubles.



Q 19

Which countries do you process payroll in TODAY with live customers running production payroll? Vs which are "supported" or "on the roadmap"?

**Listen for:** Named live customers per country. "Supported" with no production customer is a configuration project the vendor is hoping you will fund.

Q 20

Who is responsible for keeping statutory rates current? Your team, my team, or a third-party tax service? How often do they update?

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Sections 4-5 · Compliance and Integrations

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**Listen for:** Vendor-owned rate maintenance is the answer. If the rate updates fall on you, you have bought a database, not a payroll system.

Q 21

Show me your last 12 months of rate updates by jurisdiction. When CRA published a CPP rate change, how long did it take to ship?

**Listen for:** Specific dates. Updates pushed within days of a regulator notice is the standard. Updates that wait for the next quarterly release will cost you remittance penalties.

Q 22

How do you handle multi-jurisdiction employees? Someone who lives in Quebec and works in Ontario, or splits between US states?

**Listen for:** Live demo of the configuration. "We support that" with no demo means the configuration is theoretical.

Q 23

Can you generate the actual statutory filings (T4, ROE, W2, 941, NIS C10) directly, or do I export and reformat?

**Listen for:** Direct file generation in the regulator's accepted format. Export-and-reformat means a payroll analyst doing manual work every filing cycle.

Q 24

What happens if a statutory rate changes retroactively? Does the system re-run prior cycles and produce the adjustment automatically?

**Listen for:** Retroactive re-calculation across affected pay periods, with a clean adjustment summary. Manual re-keying is the failure mode.

## 05 Integrations

Q 25

What integrations do you SUPPORT (your team owns the reliability) vs what is "available" via API (I own debugging)?

**Listen for:** A short list of supported integrations with named vendor-owned reliability. A long list of "available via API" means you are doing the engineering work.

Q 26

What is the data flow direction with my GL, benefits broker, and existing HRIS? One-way push, two-way sync, or shared identity?

**Listen for:** Direction matters. One-way push to GL is normal. Two-way sync with benefits broker is the goal. Shared identity is rare and architecturally hard.

## 06 Data ownership and exit

5 QUESTIONS

Q 29

**If I cancel tomorrow, what data extract format do I get? Database dump, CSV, PDF reports, or only what I can manually export?**

**Listen for:** Structured machine-readable export of every employee, payroll, time, and document record. PDF-only or "manual export" means a contractor rebuilds your dataset for \$40K.

Q 30

**How long do I have to extract data after cancellation? 30 days, 90 days, or "request it from support"?**

**Listen for:** A specific window written into the contract. "Request from support" means a ticket queue you may not get out of in time for your migration.

Q 31

**Who owns the data? Me, you, or a joint-ownership arrangement? Read me the contract clause.**

**Listen for:** Customer ownership of all customer data, in writing. Anything else is a negotiation lever they will use in your next renewal.

Q 32

**Can I export employee data, audit logs, payroll history, and document attachments separately, or only as one bundle?**

**Listen for:** Separable exports per data type. One-bundle exports are a "you figure it out" handoff.

Q 33

**What is your data retention policy after I cancel? Deleted on a specific date, archived indefinitely, or held by you?**

**Listen for:** Deletion on a specific date with written confirmation. Indefinite hold is a compliance liability you do not need.

## 07 Security and SOC 2

4 QUESTIONS

Q 34

**Show me your most recent SOC 2 Type II audit report. Not the cover letter. The actual report and the management response to any exceptions.**

**Listen for:** The full report under NDA. Cover-letter-only is a deflection. Type I instead of Type II is point-in-time, not operational.

Q 35

**What is your breach disclosure policy, and can you share your past three years of breach notifications, if any?**

**Listen for:** Specific dates and incidents (yes, even if there have been none, that should be stated clearly). Vague answers signal a policy that has not been tested.

Q 36

**Who has access to my production data? Engineers, support, sales, third-party processors? How is that access logged and reviewed?**

**Listen for:** Role-based access controls with logged review cycles. Sales access to production data is a red flag.

**What is the encryption at rest and in transit? Where are the keys held, and who can rotate them?**

**Listen for:** Standard answers (AES-256 at rest, TLS 1.2+ in transit, KMS-held keys, customer rotation options). Anything less than current standards is a known liability.



## 08 Support and escalation

4 QUESTIONS

Q 38

What time zone is your support team in, and what is the average first-response time on a Tier 2 issue at 4pm my time on a Friday?

**Listen for:** Specific Vendor Customer time zone. "24/7" without a region is not a support and first response at low priority.

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Q 39

Walk me through escalation. How do I get past Tier 1 to an engineer, and how fast?

**Listen for:** Named escalation path with response times per tier. "It depends on severity" with no SLA is no escalation.

Q 40

What is your historical incident pattern? Outages per quarter, average time-to-recovery, post-mortem visibility?

**Listen for:** Public status page, published post-mortems, real numbers. Refusal to share is information by itself.

Q 41

Will I have a named account manager, or am I in a support queue? If named, what is their book of business: 10 accounts or 200?

**Listen for:** A named human with a manageable book. 200 accounts per AM is a support queue with a face.

## 09 Roadmap and customer voice

6 QUESTIONS

Q 42

What is on your product roadmap for the next 6 months? Share the actual roadmap, not the "vision."

**Listen for:** Dated features with release windows. "We are working on a lot" is not a roadmap.

Q 43

How do customers like me influence what gets built? Show me a recent feature that was customer-requested vs internally prioritized.

**Listen for:** A real example with the customer named. A customer-led feature shipped recently is the strongest signal.

Q 44

Who are your three reference customers most similar to me, same size, same industry, same country? Can I talk to them in the next two weeks?

**Listen for:** Three names and a fast intro. Vendor reluctance to connect references means the references are thin.

Q 45

What is your customer churn rate? Not gross renewal. Net retention over 24 months.

**Listen for:** Specific number. 100%+ net retention is healthy. Vendors hide churn behind gross renewal numbers that mask seat shrinkage.

Q 46

What is your average customer tenure? How many customers are 5+ years in?

**Listen for:** Long tenure is a trust signal. New vendors with short average tenure mean you are buying into a churning customer base.

CLOSING · HOW WORKZOOM ANSWERS THESE

# If you ask us these 47, here is what you will hear.

One employee record across HR, Payroll, Workforce, and Talent.  
\$4 per employee per month per suite, no implementation fees,  
month-to-month. Live in Canada, US, the Bahamas, and the UK.  
Cable Bahamas, County of Renfrew, and Island Luck as  
reference customers. Real names, real numbers, the same  
answers in writing.

ONE RECORD | \$4 / EMPLOYEE / MONTH / SUITE | MONTH-TO-MONTH

## NEXT STEP

### **Book a 30-minute walkthrough on production data.**

We will run the four data-architecture tests on a live customer record from Cable Bahamas, County of Renfrew, or Island Luck. You bring this worksheet, we will answer every question on the spot.

[workzoom.com / get-started](https://workzoom.com/get-started)