

12

QUESTIONS · SELF-ASSESSMENT

SELF-ASSESSMENT · HRIS IMPLEMENTATION

The HRIS implementation readiness audit.

12-point self-assessment. Where you will bleed time before you start. Where the data lives now. Run this BEFORE you sign a contract. Most failures are pre-decided.

SCORE YOURSELF | 3 SECTIONS | ~15 MIN

Most failed implementations were pre-decided.

Sierra-Cedar puts the industry average enterprise HRIS implementation at 14 months. ADP and Dayforce typically run 6 to 18 months. The most common reason a project goes sideways is not the vendor. It is decisions the buyer made (or did not make) before signing the contract.

This audit walks the 12 questions that predict implementation outcomes. Score yourself before the next vendor demo. A low score is not disqualifying: it is the work that needs to happen in parallel with vendor evaluation. Each question has a **Score** guide: 0 (not started), 1 (some progress), 2 (mostly there), 3 (locked in). Total possible: 36.

The 3 sections

- **1. Data and source-of-truth (4).** Where the employee record actually lives today. Which system is canonical. What gets migrated. What gets archived.
- **2. People and process (4).** Who owns the project. Who signs off. Who trains the trainers. What process gets re-engineered vs. lifted-and-shifted.
- **3. Scope and sequencing (4).** Phased vs. big-bang. Country and module order. Reporting requirements. Integration ownership.

How to score

- **0: Not started.** Topic has not been discussed internally.
- **1: Some progress.** One stakeholder is thinking about it; no decision yet.
- **2: Mostly there.** Working answer exists; needs formal sign-off.
- **3: Locked in.** Documented, signed off, ready to share with the vendor on day one.

Total interpretation. 30 to 36: ready to start, fast first-value possible. 22 to 29: ready to sign, do the gap work in parallel with kickoff. 14 to 21: pause vendor selection, close the gaps first. Under 14: implementation will struggle regardless of vendor.



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This audit was built from 25 years of Workzoom (formerly Nortek) implementations and the patterns Tammy Osborne (Manager, Client Onboarding) and her team see in every kickoff. The 12 questions are the ones that, when answered well, produce 30-day-to-first-value implementations and, when answered badly, produce 12-month spirals.

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Q 1

Name the ONE system that holds the canonical employee record today. (Not the HR director's spreadsheet: the system finance, IT, and the executive team would all point at.)

Score: 3 = one named system, owned by HR, with documented data dictionary. 2 = one system but the data is inconsistent. 1 = two competing systems (typically HR vs Payroll). 0 = "it depends on who you ask."

YOUR SCORE: ___ / 3

Q 2

Pull a sample of 20 employee records from your current system. Are there missing or inconsistent fields (start date, role title, manager, compensation, address, SIN/SSN)?

Score: 3 = under 5% of fields missing or inconsistent. 2 = 5 to 15%. 1 = 15 to 30%. 0 = over 30% or "we have not checked." Data quality at migration determines whether the new system reflects reality on day one. Vendor migration tools cannot fix bad source data.

YOUR SCORE: ___ / 3

Q 3

How many years of historical payroll data, pay slips, and tax filings (T4, T4A, ROEs, NIB C10s, etc.) must move to the new system?

Score: 3 = decision documented, retention policy mapped to legal requirements (CRA 6 years, NIB 6 years for most records). 2 = working assumption exists. 1 = "we will move everything" or "we will move nothing" without analysis. 0 = not discussed.

YOUR SCORE: ___ / 3

Q 4

Are taxable benefits, vacation accruals, and pension contributions tracked in payroll or in a separate spreadsheet/system? If separate, who owns reconciling them?

Score: 3 = all tracked in payroll, automated. 2 = tracked in payroll with quarterly manual reconciliation. 1 = tracked in spreadsheets that get manually entered each pay period. 0 = "we figure it out at year-end." Year-end T4 corrections are the most common implementation hazard.

YOUR SCORE: ___ / 3

Q5

Name the project executive sponsor (the person who can break ties when HR, Payroll, and IT disagree).

Score: 3 = named, briefed, calendared for kickoff. 2 = named, not yet briefed. 1 = "the CFO probably." 0 = no sponsor. Implementations without an exec sponsor stall at the first cross-functional disagreement (typically week 3).

YOUR SCORE: ___ / 3

Q6

Name the project lead from your team (the person who will be in every weekly meeting, will own the project plan, and will not be reassigned 6 weeks in).

Score: 3 = named, capacity carved out (typically 40 to 60% of one role for 8 to 12 weeks). 2 = named, capacity unclear. 1 = "we will figure it out at kickoff." 0 = no lead. Mid-project lead changes are the biggest predictor of timeline slip.

YOUR SCORE: ___ / 3

Q7

What processes will you re-engineer (improve the process AND move to the new system) vs. lift-and-shift (preserve current process, only change the system)?

Score: 3 = explicit list, with owner per process. 2 = working draft. 1 = "we will see what the new system does best." 0 = no thought given. Re-engineering everything at once doubles the implementation; lifting everything as-is preserves bad workflows in a new tool.

YOUR SCORE: ___ / 3

Q8

Who trains the rest of the workforce on the new system once go-live happens?

Score: 3 = train-the-trainer plan with named internal trainers + vendor playbook. 2 = vendor will train; we will document. 1 = "the system is intuitive, people will figure it out." 0 = not addressed. Workforces under-train themselves on every system change; lack of internal training capacity stretches "adoption" by 3 to 6 months.

YOUR SCORE: ___ / 3

Q 9

Will you implement phased (one module or country at a time, first value in 30 to 60 days) or big-bang (everything live on one date)?

Score: 3 = phased plan with specific module-and-country sequence documented. 2 = leaning phased; sequence not yet finalized. 1 = leaning big-bang because "we want it all live at once." 0 = not decided. Big-bang implementations on enterprise HRIS are where careers go to die: preserve optionality with a phased approach.

YOUR SCORE: ___ / 3

Q 10

If you operate in multiple countries (e.g., Canada + Bahamas + Jamaica), is the country sequence locked in? Which country is first?

Score: 3 = first country named, second sequenced, dependencies mapped. 2 = first country named, rest is "we will figure out." 1 = multi-country is on the roadmap but unsequenced. 0 = N/A or not discussed. Start with the country that has the cleanest data, not the largest payroll: speed of first value beats scale of first value.

YOUR SCORE: ___ / 3

Q 11

What are the 5 most-used reports today (custom or out-of-the-box) that the new system MUST reproduce on day one?

Score: 3 = list documented, sample outputs attached, vendor can be asked to match. 2 = list exists in someone's head. 1 = "we run lots of reports." 0 = not discussed. Reporting gaps surface late in implementations and trigger expensive custom-build conversations in week 10.

YOUR SCORE: ___ / 3

Q 12

What integrations are critical for day one? (GL/finance, benefits broker, learning platform, identity/SSO, etc.) For each: do you own the source system, the destination, or both?

Score: 3 = list documented with owner per integration (vendor, third party, your IT). 2 = list exists; ownership unclear. 1 = "we know we need them, will scope at kickoff." 0 = not discussed. Integrations are the most under-scoped piece of every implementation and the most common source of go-live delays.

YOUR SCORE: ___ / 3

Your total score

Add all 12 question scores. **Total possible: 36.**

- **30 to 36:** Ready to start. A 30-day-to-first-value phased implementation is realistic.
- **22 to 29:** Ready to sign. Do the gap work in parallel with kickoff. Talk to the vendor about your two lowest-scoring questions.
- **14 to 21:** Pause vendor selection for 4 to 6 weeks. Close the gaps first. Going live on a contract before you have a project lead or data quality baseline is the most expensive mistake in this list.

- **Under 14:** The implementation will struggle regardless of vendor. Run an internal kickoff first, name the project lead, audit the data, document the top 5 reports. Re-take this audit in 60 days.

Iterative, phased, first value in 30 days.

Workzoom implementations run on three principles that map directly to this audit:

- **Iterative, not big-bang.** First module live in 30 days. Additional modules sequenced based on the country, payroll cycle, and team capacity. Northern Sunrise County ran their first Workzoom payroll on January 15, less than three months after project start, 40% faster than any prior system they had tried.
- **Dedicated implementation coach.** One named human from kickoff through go-live and beyond. Tammy Osborne leads onboarding (Greg Belmore at County of Renfrew: "Shout out to Tammy, she's been really really great"). No rotating cast of consultants asking discovery questions for the first three months.
- **Implementation, data migration, training, support: included.** No setup fees, no implementation fees, no data migration fees. \$4 per employee per month per suite, month-to-month, no contract.

Three onboarding streams

- **Stream 1: Self-Serve Configuration.** Client configures from templates. Lowest-touch path, fastest go-live for small organizations.
- **Stream 2: Guided Option Selection.** Liaison configures from questionnaires for Recruiting, Onboarding, Performance, Expenses, Payroll Filings, Scheduling (simple templates).
- **Stream 3: Full White-Glove.** Implementation coach + technical lead build the full configuration alongside the client. Most multi-suite, multi-country implementations.

Reference implementations

County of Renfrew (Ontario's largest county, 900 employees): iterative implementation in early 2023. Onboarded 32 new hires in three months without growing the HR team. **Cable Bahamas** (850 employees across Nassau and the Family Islands): payroll moved from 5 days of manual spreadsheets to a 1.5-day three-step pay run. **Northern Sunrise County** (rural Alberta, 90 to 140 seasonal): first payroll on day 90, after being burned by two prior software transitions.

Ktunaxa Nation Council (BC, 200 employees): platform configured to match the Council's sector-based organization rather than forcing the Council to fit a corporate template.

Where the implementation patterns came from.

Primary sources:

- **Sierra-Cedar HR Systems Survey.** annual industry benchmark on HRIS implementation timelines. 14-month average for enterprise HRIS.
- **ADP, Dayforce / Ceridian published implementation timelines.** 6 to 18 months for enterprise deployments.
- **Workzoom client case studies.** Cable Bahamas, County of Renfrew, Ktunaxa Nation Council, Silvera for Seniors, Northern Sunrise County, Island Luck, DCAG. Available at workzoom.com/case-studies.
- **Greg Belmore (HR Manager, County of Renfrew).** video testimonial naming Tammy Osborne and the iterative implementation approach.

About this audit. The 12 questions reflect what Workzoom's implementation team: led by Tammy Osborne, Manager, Client Onboarding: sees in every kickoff. High scores produce 30-day-to-first-value implementations. Low scores produce the 12-month spirals you read about. The good news: every low score is something the buyer can fix in 4 to 8 weeks of internal work, regardless of which vendor wins the deal.

Workzoom's role. Workzoom HRIS, Workforce, Payroll, and Talent suites. Pricing starts at \$4 per employee per month per suite, no setup fees, no implementation fees, month-to-month. Reference customers across Canada, the Bahamas, and the UK include Cable Bahamas, Island Luck, County of Renfrew, Ktunaxa Nation Council, Silvera for Seniors, Northern Sunrise County, and DCAG. Jamaica HR, Workforce, and Talent are available; Jamaica payroll is rolling out through our launch partner program.

This document is operational guidance for HRIS buyers, not project-management advice. Confirm specific implementation scope with your chosen vendor and an internal project manager before kickoff.

CLOSING · TALK TO US ABOUT YOUR TWO LOWEST SCORES

Most failures are pre-decided. Most fixes are pre-payable.

Score the audit, then bring it to a Workzoom walkthrough. We will tell you which of your two lowest-scoring questions to close before kickoff and which we can carry through go-live. No setup fees, no implementation fees, no contracts.

30-DAY FIRST VALUE | \$4 / EMPLOYEE / MONTH | MONTH-TO-MONTH

NEXT STEP

Book a 30-minute walkthrough on production data.

We will run the iterative-implementation playbook on a sample scenario from County of Renfrew or Cable Bahamas, then talk through your audit score and which gaps are vendor-fixable vs. internal-only. Bring this audit; we will answer every section on the spot.

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