

HR tech stack review checklist

Use this alongside the guide. Updated October 14, 2026.

- ☐ List every HR tool, its cost, owner, and number of users
- ☐ Confirm one system of record for employee data
- ☐ Map which system owns each key data field
- ☐ Check every integration for sync timing and failure alerts
- ☐ Identify tools that duplicate data or features
- ☐ Write down ranked problems before evaluating new tools
- ☐ Define requirements for headcount, states, integrations, and security
- ☐ Request SOC 2 Type II reports and confirm single sign-on
- ☐ Ask how AI features use your data and whether they can be turned off
- ☐ Run scripted demos with a shared scorecard
- ☐ Call references at companies your size
- ☐ Model three-year total cost at future headcount
- ☐ Negotiate renewal caps and data export rights
- ☐ Clean data before any migration
- ☐ Set retirement dates for replaced tools

Shopping for HR software?

Compare 20 platforms and request free quotes at www.hrtally.com/compare/